



# Uniting Transactional and Relationship Surveys to Capture the Entire Experience

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## SURVEYING THE LANDSCAPE

It's common to think of surveys as brief, short-term tools. A customer finds a product they like, purchases it, and, more often than not, gets that little email asking how the whole experience went. While this scenario is certainly the most common way to present a survey, it's far from the only means of gauging a customer's experience with a brand. In fact, there are two kinds of surveys that, when used together, paint a far grander picture than a single email can capture.

## TRANSACTIONAL SURVEYS

Transactional surveys are the little questionnaires that customers typically receive after buying something online. (They're essentially the "how's my driving?" of the internet.) These surveys are designed to learn everything about a customer's

short-term brand experience, such as ease-of-purchase and how quickly that package *actually* arrived. Transactional surveys are also useful for gauging other customer journey touchpoints, such as call center interactions and leaving website feedback.

While short-term surveys are only one piece of the puzzle, they're important because they usually touch on a key part of a brand experience: the sale. It's crucial for business owners and experience managers to know customers' immediate feelings about a brand. Customers keep a company going; it (literally) pays to listen to them.

## RELATIONSHIP SURVEYS

Transactional surveys may be a great way to gauge customers' immediate interactions with a brand, but what about their entire relationship with one? Enter the relationship survey. In stark contrast to



transactional surveys, relationship surveys ask customers to spill the beans on their entire brand experience from top to bottom. The best relationship surveys ask customers for all of their feedback—both positive and negative—as well as their impressions of a company's brand, communications, and customer-facing organizations. Because all of these questions can make relationship surveys lengthy, they're used less often than their transactional counterparts.

Additionally, because relationship surveys ask customers to comment on an entire brand instead of a single purchase, there's a chance that they'll skew more negatively than transactional surveys. It's natural to wince at criticism, but remember that these surveys are a direct link to customers' most honest opinions about a brand. Thus, they are among the best means of pinpointing problem areas and room for improvement. Relationship surveys can even be used to determine where to place transactional surveys, enabling businesses to continuously evaluate improvement efforts. Win-win.

## THE BEST OF BOTH WORLDS

Transactional surveys may be effective for gauging a customer's individual interaction with a brand, but that's only one step of the buyer's journey. Meanwhile, relationship surveys can spot much broader improvement opportunities, but aren't ideal for ascertaining every little change. Individually, transactional and relationship surveys have their strengths and weaknesses, but they can give companies a much more complete picture together than they could separately.

High-profile companies are making effective use of these survey combos. For example, one of the largest financial institutions in the United States is using this combination to gain a much richer understanding of how customers perceive its brand. It utilizes transactional surveys to learn what customers think about individual interactions with employees, while relationship surveys are used to capture those clients' long-term engagement with the wider institution. Thus, they're able to render accurate, compelling images of both its short- and long-term impact on customers. As a result, its CX strategy was overhauled to wondrous effect.

## THE BIG PICTURE

While surveys are a great way to gather an audience's opinions, they're only as effective as business's willingness to act on them. Indeed, that resolve is ultimately more important to a survey strategy than surveys themselves!

That willingness to take action is the heart of experience intelligence. Once transactional and relationship surveys gather the insights that a business is searching for, action can turn those

insights into tangible improvements and ROI. Sophisticated data tools can only get a company so far; that profound openness to feedback and new ideas is what ultimately makes a business a customer-obsessed powerhouse. With that in mind, any business that can combine an effective survey strategy with the willingness to listen to and act on its results is capable of achieving Experience Improvement (XI) & transformational success.



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