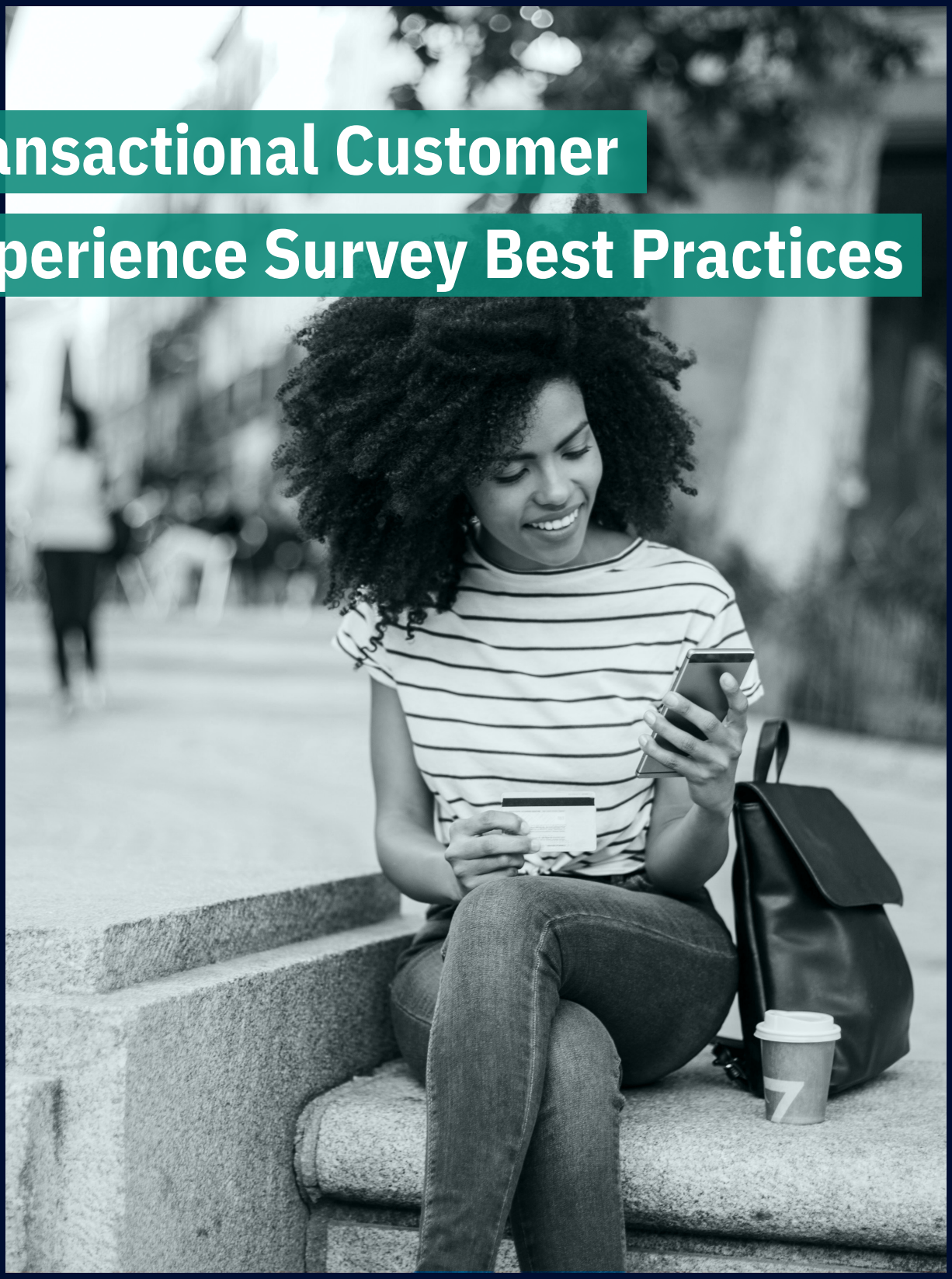
InMoment White Paper

Transactional Customer Experience Survey Best Practices



Author: David Ensing, Ph.D., Vice President, Research Consulting

“What is the best way to design a survey?”

“What questions should I include?”

“What rating scales should I use?”

At InMoment, we often get questions like, “What is the best way to design a survey?”, “What questions should I include?”, and “What rating scales should I use?”. The quick answer to those questions is that it depends on both the type and the topic of the survey.

The first thing we need to do is define what we mean by “transactional customer experience (CX) surveys.” These surveys are usually sent after a customer has had a specific interaction with your company (e.g., recently purchased a product, stayed at a hotel, visited a website, or telephoned a customer care center), and are designed to assess that transaction’s effectiveness. These differ from time-based surveys that gauge customers’ relationships with a company at various points during the ownership/usage cycle.

General Design Principles

Before we get to specific design recommendations, we should first address some general principles of transactional survey design.

PRINCIPLE #1:

Design with The End in Mind

This principle is also referred to as the "Backward Research Process." When you design with the end in mind, you must first think about the decisions you want to make and actions you want to take based on the information you collect.

Are you focused on increasing customer retention by identifying customers who had a poor experience? Do you want to "grade" your outlets or employees on their ability to serve customers? Do you want to assess which specific customer-handling processes are and are not working? The content of your survey should be guided by your answers to these questions.

PRINCIPLE #2:

Generate Hypotheses When Designing Your Survey

While designing the survey, it is often helpful to generate some hypotheses about how you think the results might turn out. This exercise can help you define what information you need to either collect or append to your survey data.

For instance, if you hypothesize that one of the most important aspects of your call center experience is efficiency, and that efficiency matters more for high-value versus low-value customers, you've just defined the need for client value and efficiency measures.

PRINCIPLE #3:

Keep it Short

Most transactional surveys should take no longer than five minutes to complete, and in instances where the transaction itself is under five minutes, the survey should be significantly shorter than that. Shorter surveys are often better, but not at the cost of losing important information.

Here are some suggestions on how to keep surveys short but still informative:

1

Use ratings questions only for the most important measures. These might include your overall experience questions, targeted questions about important parts of the transactional process, and any items being used for evaluation and/or incentive purposes.

Rely on responses to an open-ended question about the entire experience for other information. Also, in an online survey, set up realtime automatic probing of open-ended responses to encourage longer comments that contain more information.

2

Don't ask questions you already know the answers to. For instance, many variables that you may want to include in your reporting (e.g., customer demographic data, transaction value, transaction type, etc.) are probably already captured in your systems. This information can be appended to the sample data (e.g., name, email address, etc.) so it does not have to be asked in the survey but can still be used as part of your analyses and reporting.

One caveat here is that you need to trust that your database information is correct. If not, you'll likely need to ask some of these questions to verify.

3

Instead of asking about all aspects of a transaction, focus your questions around the parts of the experience that you know drive preferred outcomes, such as customer loyalty, customer recommendations, or overall satisfaction.

These drivers can be identified in a separate periodic study using a small cross-section of your customers or after a detailed customer journey map has been constructed. Using this approach, most transactional CX surveys can adequately measure an experience using 10 or fewer rating questions.

4

Resist "nice to have" questions and questions unrelated to the transaction. This may seem obvious, but many CX programs ask a multitude of questions because internal stakeholders often ask, "Since you are contacting our customers anyway, could you ask them about X?"

When considering whether to add new questions, always ask who will be using the data, what decisions they will make depending on the results, and whether there is another way to get this information without directly asking the customer.

PRINCIPLE #4:

Don’t Forget About The Survey Invitation

One of the most neglected parts of the survey design process is the survey invitation. Often, it is designed as an afterthought. You need to design your email invitation to maximize the likelihood that customers will receive it, notice it, open it, and click the survey link.

PRINCIPLE #5:

Think About Survey Timing

It is generally best to survey the customer as soon after the transaction as possible. Prompt surveying will help customers recall the event accurately and will help with response rates because they are still emotionally invested in the transaction.

However, there are some transactions that might require a delay in executing the survey. For instance, if the customer has gone through a repair experience, you might want to wait a few days before sending the survey invitation so they have time to assess whether the repair was successful.

PRINCIPLE #6:

Conduct a Census for Less Frequent Transactions

Most online survey programs use a census approach wherein all customers undergoing a transaction are surveyed, as opposed to surveying a subset of customers. CX professionals typically utilize a census approach because at least one goal of most transactional CX surveys is to identify customers who had poor experiences and rescue them.

Surveying all customers is also important because most companies want to assess performance at the unit (e.g., store, hotel, dealership, etc.) or employee level. Without that holistic view, it is usually very difficult for brands to obtain adequate samples at these lower levels of analysis.

The big exception to surveying all customers occurs when customers interact frequently with your company via different channels or by engaging in multiple transactions with your company. In these cases, you need to create a sampling process to protect your customers from receiving too many feedback requests.

> **"Without a holistic view, it is usually very difficult for brands to obtain adequate samples at these lower levels of analysis."**

Most survey programs have fatigue rules that limit the number of surveys a single customer can receive in a certain period of time. Fatigue rules vary from industry to industry, but generally, a customer should not be surveyed more than a few times a year.

PRINCIPLE #7:

Test Your Survey

Take the survey yourself and put yourself in the customer's shoes. To get a customer's perspective, actually engage in the transaction you are asking about or recall a similar transaction you had and use that as the basis for your response. When taking the survey, pay particular attention to confusing wording, possible assumptions, questions that don't make sense, and possibly ambiguity.

It is also a good idea to have a few people outside your team take the survey and produce real data. Then, you can look at your data to determine if you have any collection or formatting errors in the data, as well as if the data will answer your questions. You should also make sure that any skip patterns in your survey are working properly. Finally, it is always a good idea to pilot your survey with a small group of actual customers before fully launching it.

Specific Design Principles

In addition to these general principles, keep these more specific design considerations in mind.

PRINCIPLE #1:

Question Order

Overall experience measures (e.g., likelihood to recommend, overall satisfaction with the experience, etc.) should come first in your survey because they are usually the most important questions and are often used for overall performance trending, evaluation, and incentive purposes. If this is the case, you want to capture responses to these questions early so you still have that information if respondents drop out of the survey.

Another advantage of asking the overall questions first is that it produces a top-of-mind evaluation that is not influenced by detailed questions you ask later in the survey. If you consistently put the overall measures first, it also makes it easier to make comparisons across surveys.

Next, it is often beneficial to ask for a description of the experience using a broad, open-ended question. From there, questions about the details of the experience should proceed in the order of the actual experience. In other words, you should walk the customer through the experience with your questions. This helps customers recall the event and makes the survey-taking process easier. Finally, end by asking whether the customer would like a follow-up contact.

PRINCIPLE #2:

Rating Scales

Number of Points

People often ask how many points their rating scale should contain. In general, rating scales with more points (e.g., a 10- or 11-point scale) produce more differentiation than smaller scales (e.g., a 5-point scale). However,these differences are not very large, and what is most important is that the scale displays properly on all devices customers might use. Rating scales using less than 5 points are discouraged because they provide less differentiation.

Scale Anchors

Generally, scales with five or fewer points should be fully anchored, meaning that each scale point should have a label (e.g., Poor, Fair, Good, Very Good, and Excellent). Longer scales are usually end-anchored or end-and mid-point anchored because it is difficult to present large numbers of anchors on small devices.

Use of "Not Applicable" or "Does Not Apply" Response Options

In general, you should avoid situations where these response options are needed. They should not be used for the overall questions because those questions should apply to everybody. For more detailed questions, use skip patterns in the survey to avoid asking questions that do not apply to certain customers.

If you have to use these response options, make sure to use formatting in your survey to clearly delineate that they are not part of the rating scale. If you don't, many customers will click the "Does Not Apply" or "Not Applicable" response option thinking they are giving the highest or lowest rating (depending on which side of the scale it is placed).

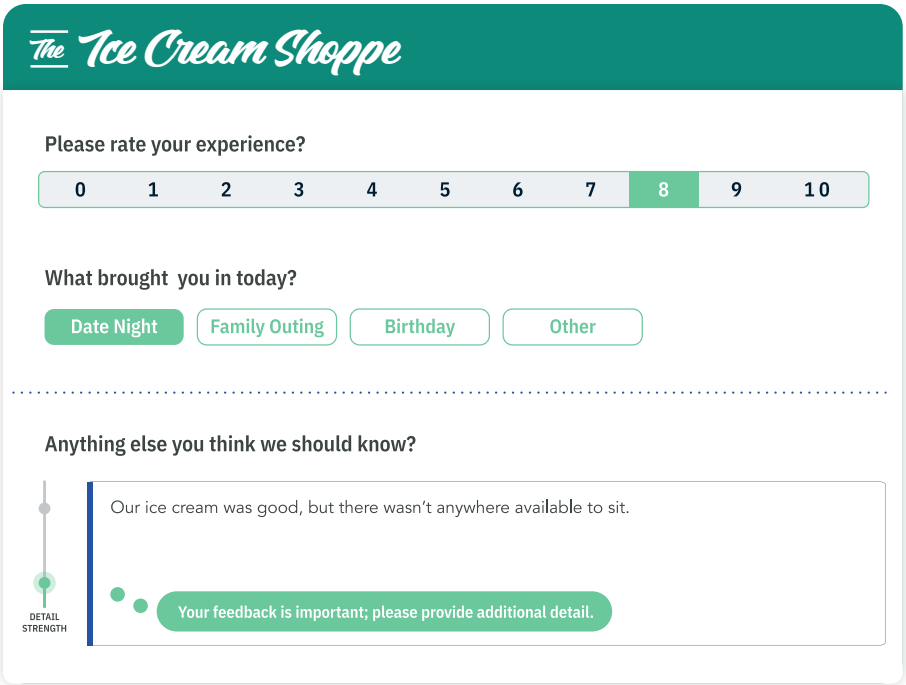
Scale Direction

It is usually best to present rating scales horizontally with the lower ratings on the left and higher ratings on the right. This is because most languages are read from left to right, and coming across the lower ratings first tends to increase data differentiation.

Scale Consistency

It is very important that you keep your scales as consistent as possible within the survey. Survey-takers often just scan the scale and, once they feel they understand it, they tend not to read it. Therefore, keep scale points and scale anchors the same as much as possible and never switch scale directions within a survey.

Consistent use of scales across questions also makes it much easier to make comparisons between items on your survey. Finally, it is also desirable to use consistent scales across your studies to make between-study comparisons as easy as possible.

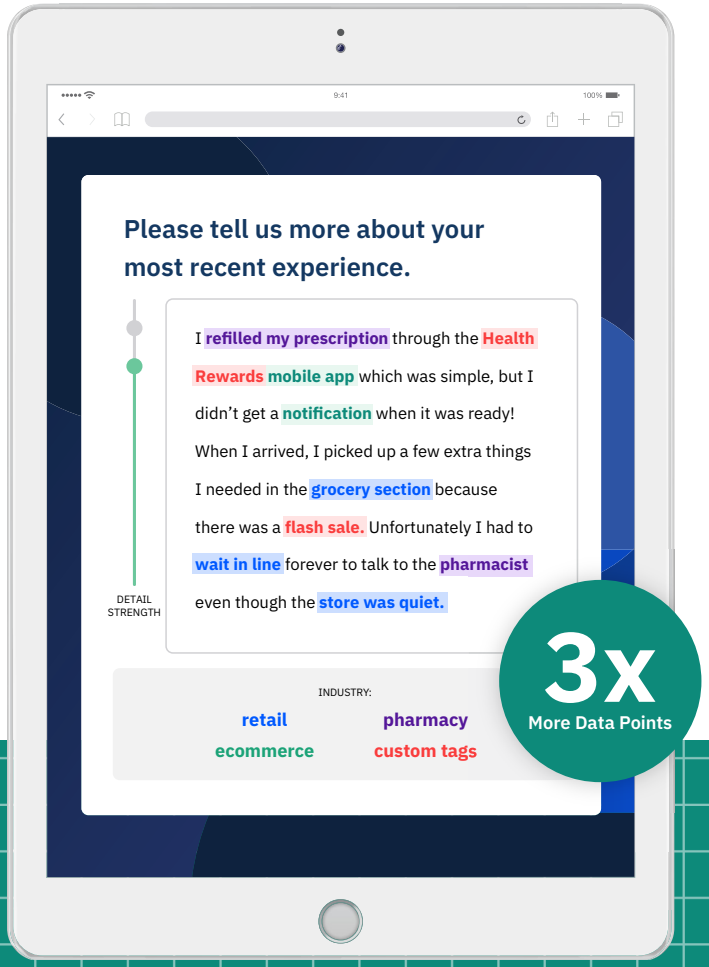


PRINCIPLE #3:

Open-Ended Comment/ Verbatim Questions

In transactional CX surveys, it is generally sufficient to ask one broad, open-ended question that asks respondents to describe their experiences. This comment can be mined using automated text analytics to identify what topics customers discuss and the positivity/ negativity of the comments.

Only ask open-ended questions as a followup to rating questions if it is very important to get further clarification about the rating. Asking too many open-ended questions gets monotonous and frustrating for the respondent.



PRINCIPLE #4:

Mobile Optimization

Over the past decade, smartphone-based responses to online CX surveys have gone from being a small minority of responses to over 60 percent. Therefore, make sure your surveys are optimized to both load quickly and format well on smartphones. In addition to testing how your survey appears on different smartphones, be sure to test how it appears on different browsers and devices.

PRINCIPLE #5:

Request for Follow-Up Question

It is generally a good idea to ask customers if they would like the company to contact them to follow up about their experience. However, if you ask this question, you must have good followup processes in place. It is much more harmful to ask customers if they want a followup contact and then not contact them than it is to not ask the question at all.

PRINCIPLE #6:

Forcing Responses

In online surveys, it is possible to force respondents to answer questions by preventing them from going further in a survey if they leave a question blank. While this practice ensures you do not have missing data, it can lead to higher dropout rates and to larger amounts of misleading information. You should only force responses to your most important questions and to questions that are the basis for skip patterns or response piping (i.e., Including the customer's response in a follow-up question).

Also, questions in which you force a response need to be applicable to everyone or have a "Not Applicable" or similar response option. Never force respondents to answer questions about sensitive topics like gender, income, and racial background. If forced to answer these questions, some respondents will either provide incorrect information or abandon the survey.

PRINCIPLE #7:

Trap Questions

Trap questions are sometimes included in surveys to make sure the respondent is reading and paying attention to the questions and, more recently, to make sure surveys are being responded to by a human rather than a bot. A trap question might read, "Please select 'Somewhat Satisfied' for the answer to this question."

Trap questions are not recommended for inclusion in transactional customer experience surveys because respondent inattention or bot activity usually do not occur with them. They tend to occur in longer, panel-based surveys when respondents are getting paid for their participation. Trap questions can also be confusing and off-putting to customers.

Summary

As you can see, designing a transactional customer experience survey takes careful planning. A large part of that planning comes in the initial phase that many people skip: defining what information you need to make informed decisions and taking action based on what you collect. With that in mind, and with the guidelines above, you should be able to design an efficient and effective survey. Good luck, and let us know if we can help!

To demo a product or to contact us call:

NORTH AMERICA
+1 385 695 2800

UK & IRELAND
+44 121 296 5245

APAC
+61 (2) 8397 8131

GERMANY
+49 (0) 40 369 833 0

Or email us at sales@inmoment.com

About InMoment

Improving experiences is why InMoment exists. Our mission is to help our clients improve experiences at the intersection of value—where customer, employee, and business needs come together. The heart of what we do is connect our clients with what matters most through a unique combination of data, technology, and human expertise. With our hyper-modern technology platform, decades of domain authority, and global teams of experts, we uniquely deliver a focus on Experience Improvement (XI) to help our clients own the moments that matter. Take a moment and learn more at inmoment.com