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In the last edition of Stakeholder Satisfaction we discussed the pros and cons of different survey methods. In this article, we will go into more detail about some of the latest self-completion methods, which we had said were useful for conducting transactional customer experience research in particular.

The three types of self-completion survey method we are going to cover here are:

- IVR (Interactive Voice Response)
- Text
- Point of sale

With **IVR surveys**, there are two main ways of administering the survey. Firstly, customers can be given a freefone telephone number to call where they connect

to the survey and answer pre-recorded questions, using the buttons on their phone or speaking. This telephone number can be given to customers on a one-to-one basis, for example sent through the post to them or at a face to face point of sale, such as on a till receipt. Alternatively, the survey telephone number can be publicised en masse, for example, on a company's website. The second way of administering an IVR survey is to trans-

fer customers to the survey from the call centre after they have called your company. If this happens the customer would not have to pay for the cost of the survey call.

This second way also has different options as to how the customers' call can be transferred to the survey. The most straightforward option is that customers are manually transferred to the survey after their call. This is done by the member of



staff who has been speaking to the customer, who first needs to ask if they are happy to take part in the survey. However, one obvious problem with this option is that the staff member could choose not to ask certain customers to take part, for example if they felt that the customer was not happy and may give a poor score. Transfer rates by staff member can be monitored though, allowing you to see if certain staff members were transferring fewer customers to the survey than others. It should be noted that staff selecting the respondents does encourage 'buy in' from staff as it is difficult for them to challenge the results when they themselves have selected the respondents.

To overcome the problem of 'cherry picking', rather than manual transfer by the staff member the customer can be asked if they would like to take part in the survey before the call, via a pre-recorded message before their call is connected to a staff member. If the customer has indicated that they would like to take part, they are told to hold the line once they have spoken to the staff member. However, the problem here is that customers may forget to do so. An alternative option is that instead of holding the line at the end of the call, the customer is offered a call back facility if they want to take part in the survey. They are then called back and automatically connected to the pre-recorded survey.

With **text message surveys**, customers are sent survey questions via text message to their mobile phone. Questions can be closed, or open-ended to obtain comments. One question is asked per text and as with other surveys, questions can be routed so that the customer gets asked different questions, depending on the responses they have given. As an alternative to sending out specific survey questions, like with the IVR option, a text message number can be advertised, inviting open-ended feedback from customers, for example at an event.

Point of sale surveys capture customer feedback at the point of sale where the customer interaction is face to face. Customers access the survey at kiosks and fill in the survey immediately after the interaction they have experienced.

The advantages of these survey methods outlined are...

- ✓ Real-time reporting is usually available.
- ✓ The experience is still fresh in the customer's mind, particularly for point of sale and IVR surveys where the customer is transferred straight from their call to the call centre.
- ✓ These type of surveys tend to be cost effective, particularly to obtain enough surveys to measure individual staff member performance.
- ✓ You don't need to have a customer database, customer feedback can be captured face to face at the point of sale, or a text message number or IVR survey telephone number can be advertised. In this way, IVR could in fact just be used as a means of allowing customers to register their interest in taking part in research, such as a telephone survey or focus group.
- ✓ Good for engaging staff and motivating them to understand what customers think of their organisation and specifically to understand their 'own' customers' satisfaction, as the lower cost allows for results at an individual staff member level. As IVR provides 'vox pops' or 'sound bites' from real customers, it is a useful tool for 'bringing the customer to life' for staff.
- ✓ Useful to measure the incidence of certain actions or staff behaviours that have been identified as having a positive impact on customers' satisfaction. For example, the survey could ask whether the staff member had offered to pack the customer's shopping for them at a supermarket. This type of measure was often traditionally tracked by mystery shopping, but is obviously more credible if the findings are from real customers.
- ✓ Good for getting customer feedback from people without internet access.
- ✓ These surveys are often completely anonymous.

The disadvantages of these survey methods are ...

- × There is a fairly limited number of questions compared to other self-completion methods such as postal and email surveys. The surveys really need to be restricted to a duration of a couple of minutes. IVR surveys should be no more than ten questions and text surveys should have a maximum of five questions. However, there is the opportunity to rotate the questions asked to cover a wider number of questions across the survey.
- × To measure the true end to end customer experience the surveys that take place at the point of interaction, or immediately afterwards, may be too soon to measure customers' true satisfaction. For example, at point of sale, the customer has not yet got the product home to see if they are happy with it and that it does meet the requirements outlined by the member of staff. The customer hasn't yet found out whether the promises staff made were kept or the advice given by staff was correct.
- × Text message surveys are limited to people who have mobile phones and use text messaging which may limit input from the older generation.
- × Text surveys cost the customer to send responses, but as many people are on packaged deals with a certain number of free texts, this should not affect too many people.

These survey methods often represent a trade off, where greater volumes of response are gained at the expense of reduced quality and depth of information, and therefore understanding. One of the main benefits of these methods is the lower cost allowing for greater volumes to obtain individual staff member results. They are perhaps therefore often functioning more as a staff engagement tool than a replacement for statistical customer experience measurement. The 'vox pops' captured can also be relayed back to employees to bring customer feedback to life, further boosting employee engagement. **S**