

White paper:

From Insight to Action: How Alerts & Triggers Can Transform Your Surveys

Introduction

A Rice/NYU study showed that customers who took part in a customer-satisfaction survey were more loyal than those who did not. These customers were:

- More than three times as likely to have done new business with the firm.
- Less than half as likely to have defected.
- More profitable than the control group.
- Did new business at a faster rate and defected less than customers in the control group, even 12 months later.

The study, "How Surveys Influence Customers", published in the Harvard Business Review in 2002, has some important caveats, of course. But the authors, Paul Dholakia and Vicki Morwitz, theorize about how surveys can improve satisfaction:

The simplest [theory] is that satisfaction surveys appeal to customers' desire to be coddled, reinforcing positive feelings they may already have about the surveying organization and making them more likely to buy its products. Surveys may also increase people's awareness of a company's products and thereby encourage future purchases. More subtle is the idea that the very process of asking people their opinions can induce them to form judgments that otherwise wouldn't occur to them—that they really do like a company's estate-planning services, for example. These so-called measurement-induced judgments, the theory holds, can influence later behavior.

Combine this with the use of survey triggers and email alerts to intervene when customers provide low satisfaction ratings, and you have two compelling arguments for how conducting customer satisfaction surveys can improve overall satisfaction levels.

The Rise of Survey Alerts

Once upon a time, surveys were conducted annually, and the results were used to understand the overall satisfaction level of customers as a group. Are customers more or less satisfied than last year? What should our priorities be to improve satisfaction this year?

Online surveys have transformed this process in two key ways: first, web surveys are often conducted continuously rather than periodically, and second, surveys can now be used to intervene on the behalf of individual respondents. Measuring satisfaction in aggregate is no longer sufficient when you can intervene to improve that satisfaction on a respondent-by-respondent basis.

Since at least 2003, Vovici survey software has enabled authors to set up email alerts or triggers based on answers to individual questions. If a respondent selects a specific choice, or fills text in a specific open-ended question, an email message can be immediately sent to an employee, summarizing the respondent's relevant answers and providing contact information so that immediate action can be taken.

Examples of Successful Survey Alerts

Here are some representative examples of the types of alerts that our users have set up:

Reactive

- **Help-desk ticket satisfaction** – For a follow-on survey to employees who contacted the IT help desk, if the employee indicated that the issue is not resolved, an escalation email is sent to a help-desk manager.
- **General dissatisfaction** – In a satisfaction survey, if the respondent provided a low rating, the survey skips them to a choose-all-that-apply question that asks them for the reasons for their dissatisfaction. That is then followed up with an essay question asking for more detail. Based on the reasons chosen, the software emails an alert to the appropriate department (e.g., service department, billing department).
- **Hotel-stay satisfaction** – For a web survey taken from a set-top box in the hotel room, guests are asked for their satisfaction with room service, housekeeping and the front desk. In case of dissatisfaction with any of these, the appropriate manager is notified by email.
- **Major account satisfaction** – For every survey completed, as it is completed, a copy of the results is sent to the sales manager of the account for their review.
- **Renewal likelihood** - An ISP (Internet Service Provider) developed a Renewal Likelihood Index consisting of three questions designed to measure the probability of an individual customer renewing when their annual service contract was up. As the predictive value of this measure proved itself over time, all surveys to customers included these three questions and a low score would send an email trigger to alert a service representative. That way preventative measures could be taken to keep the at-risk customer from leaving at the end of their contract.

Proactive

- **Customer-service satisfaction** – Perhaps the customer is satisfied and their past ticket is closed, but they have a follow-on question. The survey prompts to determine if they need additional assistance and sends an email alert to the service department if they do.
- **Literature fulfillment** – The respondent selects from a list of additional information on the topics of the survey, and is sent in return an email with links to that information.

With email alerts, surveys don't have to be just for measuring satisfaction: they can be for improving it as well.

Setting Up Survey Alerts

Adding email triggers to a traditional questionnaire starts the transformation from survey project to survey process. Some issues to consider:

- **Move from a random sample to a census to maximize exposure to negative feedback.** By replacing your random sample with an attempted census of everyone, you will have the opportunity to intervene with more individuals to attempt to improve their satisfaction. The trade-off to balance against this is that customers are now receiving surveys from you more often; this can be worth it, though, given the new opportunity to right previous customer-service wrongs. Typically, you will want to automate survey invitations, using input from an internal system such as a help-desk to drive invites. Implement touch-management rules so that people do not receive more than one survey of this type every 60 days.
- **Adding or expanding the series of reminders.** Sending reminder emails to potential respondents who haven't yet taken the survey can be an annoying nuisance. In fact, we often argue for the need to respect your potential respondent's time and interrupt them as little as possible. Yet our survey software includes the ability to schedule as many follow-up email reminders as you would like. Why? In the case of survey alerts, you really want to make sure unhappy customers raise their hands so that you can help them. A series of reminders, each spaced 3-5 business days apart, helps achieve this.
- **Develop the business rules for customer-service responses.** Some organizations simply have survey alerts delivered to a single email address, often that of customer service (for customer surveys) or the internal help desk (for employee surveys). Others use multiple questions for triggers, and set up elaborate business logic to notify staff with the right responsibilities to issues in their areas.
- **Integrate with case management.** Most organizations integrate email triggers into their existing case-management systems, so that survey alerts are prioritized and acted on alongside more traditional cases. Integration can be as basic as using the emails as inputs, to more sophisticated systems integration involving web APIs (Application Programming Interfaces).

Closing the Feedback Loop

When surveying customers, employees, partners and other key constituencies, your respondents complete the survey because they value their relationship with you and they want to see you improve. Implicit in the fact that you sent them a survey is your intention to learn, adapt and change based on the results. Accordingly, to close the feedback loop with respondents, you should:

- Explain what you're using the data for
- Share summaries and slices of the data with respondents
- Identify actions you're taking as a result of the survey
- Consider using web seminars, video conferences and meetings to share data

Many survey-software applications include the ability to send a thank-you notice to all respondents. This is an excellent way to point out some of the above.

With the survey completed, use the occasion to stimulate additional participation and tease out elaborating feedback. It can also be an excellent opportunity to set up an online community for the ongoing gather of qualitative and quantitative feedback.

Turning Feedback into Sustainable Competitive Advantage

What's the hardest part about gathering feedback? It's not the technology. A survey with email triggers can be up and branded within hours. It's not integrating the alerts with existing case-management systems. The IT department can approach that with gusto. The hardest part is preparing your organization to receive and act on the feedback.

Who is going to spearhead evaluating ideas for cost and impact on the business? Not the survey author. Who is going to analyze the results and identify the organization's priorities? Who is going to implement each idea, champion it throughout the organization and see it through until it is complete? Definitely not the survey author!

Remember, customers participate in surveys because they want your organization to serve them better. You owe it to them to follow through.

Short term, you need to develop an infrastructure that will enable you to rapidly implement new ideas. This should be a cross-functional team charged with evaluating the big ideas—the major initiatives—for ROI, prioritizing them, championing them to the executive team, then transitioning each idea to the appropriate department for implementation.

Long term, you want to disseminate the smaller, easier to implement ideas throughout the organization: you want foster an organizational culture centered on customer-driven innovation and co-creation.

Remember, feedback is only as good as the changes it inspires. Moving from insight to action isn't a one-time event, but an ongoing process of change that builds sustainable competitive advantage.

About Vovici

Vovici is the pioneer in Enterprise Feedback Management (EFM), providing comprehensive survey software, panel management and online community solutions. Our survey tools enable organizations to centralize feedback data collection, build and manage proprietary panels, leverage corporate social networking, and utilize robust survey analytics and reporting. Our solutions increase customer loyalty, facilitate collaboration and innovation, influence critical business decisions and provide voice to online communities. Organizations worldwide, including more than half of the Fortune 500, rely on Vovici to gather feedback on customer satisfaction, perform market research and gauge employee satisfaction.

- We are 100% focused on Enterprise Feedback Management
- We have more than 15 years of industry experience
- We have over 3,000 customers and are used by 58% of the Fortune 500
- We invented the term Enterprise Feedback Management and persuaded Gartner and our competitors to adopt it
- We were the first EFM vendor to provide functionality to engage online communities for feedback
- We have processed over 150 million completed surveys for our customers
- We have a full spectrum product offering that meets the needs of our customers from simple survey tools to comprehensive, fully integrated feedback solutions
- We have our roots in two of the early pioneers and market leaders in Enterprise Feedback Management—Perseus and WebSurveyor.