



THE CX EXPERT'S GUIDE TO
Asking Survey Questions that Drive Change:
15 Question Recommendations and 5 Bonus Tips for Success



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The CX Expert's Guide to Asking Survey Questions that Drive Change

Among the questions we receive from our customers, one of the most frequent is simply: **“What should we ask in our surveys?”**

Great question! But it's very difficult to answer because there isn't a single formula to suit every business. Instead, we created this short paper to provide guidance on survey questions that can actually drive improvements within your company, which is the ultimate goal of any feedback program. The suggested questions focus on key transaction points in the customer and employee relationship, such as right before they go to a competitor or just after they gave you a rave review. In other words, they are prime, ripe moments for asking for feedback.

These are certainly not the only questions you should ask. Additional questions are entirely up to you, as long as they're created with the end result in mind (i.e. will this feedback help us change or improve the business)? You will surely come up with others that speak specifically to your audience and area of expertise. Again, our suggested questions are meant to serve as guideposts to mark important moments along the journey where it's ideal to ask for input, but you may need to tweak the language as it applies to your company's products and services.

15 Survey Question Recommendations That Drive Change

It's a tough thing to go looking for feedback.

You have to dig in, ask your ego to go out to lunch, and be prepared to find out hard truths about your business and (gasp!) yourself. Questions to gather feedback and surveys are great, but it's easy to ask questions that lead the witness.

“Are you satisfied” is a lame customer question. What does it tell you if they are? What if they aren't? What action can you take with that information?

What if we thought differently about what we ask customers?

Before you ask THEM, ask yourself WHY.

Why are you asking for this feedback, specifically? Do you want to hear how to improve? Do you have a problem you are trying to identify? Asking specifically why we're going through the exercise of gathering feedback is a great way to prompt thinking of the best ways to get it.

Here are a few ideas to use in your surveys and beyond!

1 If a customer seems “satisfied,” but not enthused, ask:

“What should we add to our service or products?”

Many times, we humans don't know what we want. Asking “what would make you satisfied?” really leads to a lot of “um” and “I don't know” replies. Asking what should we add forces the user to think about what's missing. This is also a great way to generate new product and service ideas that don't come from within your own four walls. Your customers might have even fresher, more innovative ideas than your own staff.

3 If a customer has left you for a competitor, ask (ideally a few weeks later):

“How's it going with your new provider? Can you share what's working better?”

Your goal here is not about THIS sale. Please don't make it about winning them back. The message and goad should be about learning for the future. Today's savvy buyers can smell a sales pitch from a mile away, especially a desperate plea to come back and give you another shot. Instead, focus on earning their respect and keeping the relationship door open.

2 If a customer matches the profile of one who might defect, ask:

“What should change today to keep you as a loyal customer?”

Don't ask “What can we do to keep you?” It's generic. We've heard it before. Asking what should change today empowers the customer to tell you exactly what's on his or her mind. For example, if a customer says that her real frustration is with billing, you can easily identify the root cause of the problem and solve it quickly. When you do, be sure to communicate back to that customer (and others with similar feedback) that you've addressed the complaint. That is powerful.

4 If a new customer raves about your first project or comes back to your store to rave about the first interaction or product, ask:

“Can you think of others who we should talk to? We build our business on referrals.”

In the beginning, when the relationship still has that new relationship smell, this is the BEST time to ask for referrals. Invite customers into the process. You may also want to consider adding an incentive to your referral request such as a discount on their next purchase or points in your loyalty program.

5 If a customer happily pays their bills, interacts just as they should, and overall seems pleasantly loyal, ask:

“Would you like to be on our customer advisory board?”

The best customers are often the ones who are easy to ignore. They are not the squeaky wheels or the biggest cheerleaders, but they support your business every day. Ask them to participate in an ongoing conversation about your business for the reward of getting more of what they love. There are lots of ways to do this – with or without more incentives – that depend on the type of business. Help them feel important and needed, and emphasize that you value their input very much.

6 If your client expresses frustration with the way things are going, ask:

“What would make it easier? Name anything.”

Some customers may be willing to express frustration but may also carry cynical attitudes about whether or not their complaint will actually affect change. You can follow negative feedback with a question that helps your client overcome these limitations and consider ways to help.

“Your most unhappy customers are your greatest source of learning.”



*Bill Gates
Cofounder, Microsoft*

“ If you do build a great experience, customers tell each other about that. Word of mouth is very powerful.”



Jeff Bezos
CEO, Amazon

7 If you might have an employee problem, ask:

“What was the best thing Mary did for you today?”

If the best thing is that Mary solved the problem, but the customer can't tell you much more, it's time to start seeing if Mary is actually being pleasant and helpful. If the best thing is “she didn't hang up on me,” then you might have bigger issues at hand. Note that this suggestion uses the name of the agent specifically to personalize the feedback, which will give you better insight into the actual transaction much more than, “Did we solve your service issue today?” Naming the agent opens the door for much more specific comments, such as, “Mary was great! She really knows her stuff.”

8 Reward your best employees. Ask:

“Who serves you best here?”

If there is a stand-out relationship that helps your customers stay loyal, this is a great way to find out.

Bonus tip: If the customer answers with just a name and no more information, that means this person is the best of the “just ok.” If the answer includes sincere superlatives, details about WHY this person is great, or requests for you to “hire another” like him or her, that tells you this person is a very valuable asset. Study what your star offers to customers and replicate it as much as you can. Don't forget to reward your star for a job well done!

“

There is only one boss:
the customer. And he can fire
everybody in the company
from the chairman on down,
simply by spending his money
somewhere else.”

Sam Walton
Walmart Founder

9 At any point, ask specific questions about process. Ask:

“What can we do to improve our billing process?” or “What should we do to make signing up easier?”

Specific questions help us think in a focused way. These questions will lead to a lot of information you won't be able to gather with “what can we do to improve?” This type of feedback is also often the easiest to address and fix because of its granular nature. It will typically reveal the small things that you as an organization don't realize, but that forces customers to take extra steps. It might lead to feedback such as “Don't make me re-enter my full contact info every time I request service. Can't your systems recognize me by my email address?”

10 If you have a storefront or front desk, ask: “How were you greeted today? Were you offered help/water/instructions?”

The reception we get as employees (especially if you're an owner, manager, or executive) is typically much different than what our customers get. You need to inquire about these experiences in precise ways. If you have protocols or procedures that are supposed to be followed when a customer enters the space, ask about them specifically to reveal if they're being followed. “She was great” is very different than “Yes, I was offered water and asked if I needed help picking out my items.” There's no point in asking generic questions that force you to read between the lines. Be specific.

“ Know what your customers want most and what your company does best. Focus on where those two meet.”



Kevin Stirtz
Author and Customer Loyalty Expert

11 To see how you compare to competitors they don't mention, ask:

“What other tools do you use to solve this problem?”

It's best if you can ask specifically about the problem, but asking this question helps you have some insight into your customer's ecosystem. What workarounds do they use to work with your product or service? What duplicate tools do they have to rely on simply because yours might be missing a feature? This question can enlighten you to gaps in your products and services. It can also identify areas of weakness, where your competitors do better than you. This type of feedback can be more valuable than a roomful of product managers.

13 If a customer is going to leave you, ask:

“Is there a time in the future you could see yourself being our customer again?”

Don't just avoid him. Accept you may have lost him now, but could earn him back eventually. If the answer is a hard no, believe him and thank him for his honesty. Don't defend your policies, products, or whatever turned him off. And no matter what, don't try to sell. If the answer is yes, but only if x/y/z happens, that's a gold mine of information. Whatever could bring him back to you is what drove him away. Pay attention to the subtle or not-so-subtle complaints about what was enough to make them pack up and go.

12 If your customer was acquired by referral, ask:

“What did the referrer say that got you interested in our company?”

Listening to the answers can tell you a lot more than you might think. Whatever the pattern is to the answers can tell you a lot about where your competitors might be failing. If a prospect says “I heard you guys are easier to work with than X Competitor.” If that's something you hear more than once, then it's time to double down on making your business easy to do business with to stay ahead. Whatever the consistent answer, that's what your customers are saying about you to sell your products. Listen to them. That's your new sales pitch!

14 If you aren't sure what to ask:

“What do you think our leaders need to know about how we treat customers / employees?”

Customers and employees want to praise those who did right by them and let you know about what went wrong. Asking a question this way can help them frame things in a constructive way. It shows that you recognize your own blind spots and need their insights to enable improvements. They might tell you “You should know your people are awesome!” or they might tell you “You should know I hate calling your customer service line because it's a massive waste of my time. Can't you shorten those wait times?” In many cases, this will reveal information you can use immediately to make the experience better for everyone.

15

Finally, ask this one early, often and repeatedly:

“Are you getting everything you need from us?”

Give your clients, customers (and as a bonus, your employees) the room to articulate that their every need is being met and on the flipside, when things are less than perfect. This question opens a pathway to responses such as “Actually, no. I wish my account manager would call me on a regular basis to check in.” Or, “Yes, but maybe a little too much. I wish you wouldn’t send me so many emails. I’m thinking of unsubscribing.” This type of question inspires thoughtful responses on both the positive and negative sides of the story. It also allows you to respond with a sincere “I’m sorry” or “Thank you for telling us” in a way that may actually serve to deepen the relationship, even if the input was a complaint.

“ The more you engage with customers, the clearer things become and the easier it is to determine what you should be doing.”



John Russell
President, Harley Davidson

Question Everything & Everyone!

It's a way to get the truth when you may not know what truth you need to hear. Keep in mind as you streamline your survey questions that people, in general, are nice. We like to please others and don't always want to share honest feedback. Look for as many ways as you can to open that door and encourage candor. You can add copy to your survey intros that reassures people that you truly value their insights and are willing to make changes based on their input. Let them know you can handle it, whatever it is. Beyond that, be the kind of company that actually CAN handle it and uses feedback to continually improve the business.

We'll leave you with a mantra for your feedback programs: never stop asking. You'll learn amazing things as long as you never stop listening!

In addition to integrating these questions into your feedback program as appropriate, here are five bonus tips for building successful surveys:

- **Short and simple.** People are strapped for time. Some experts suggest the Five Rule, which is keeping surveys to five questions or fewer with an estimated completion time of five minutes or shorter. Surveys longer than 15 questions show significant dropoffs in completion rates.
- **Strategic and specific.** Considering the above point, you have very limited space to request feedback, so don't waste any real estate. Every single question must pass the test of being tied to business goals and outcomes. Other ways to think about it are: "What are we planning to do with these responses" and/or "How will this data be used?"
- **Clean and good-looking.** Your marketing department spent a fortune streamlining the look and feel of your brand. Please do not reinvent the wheel. Stay within your company's style guide and minimize unnecessary flourishes in layout that may be more of a distraction than an enhancement.
- **Need to know only.** Let's not ask people to enter their name and address if you already possess that information. Either pre-fill known fields or simply leave those questions out. Again, you don't have room for fluff and it's a bit disrespectful. No one is thrilled to type out their name and email address on a survey that they just received via email with a personalized greeting.
- **Test and test again.** This tip applies both to technical testing (especially if you're integrating feedback into other systems, such as CRM) and to experimenting with things like lists, segments, subject lines, question wording, and beyond. Be scientific in how you measure results. You may find that changing something simple, such as a subject line, makes your response rates skyrocket. The key is knowing rather than guessing why.



Customers don't expect you to be perfect. They do expect you to fix things when they go wrong."



Donald Porter
VP, British Airways

ABOUT 360CONNEXT

360Connex specializes in customer journey evaluation, customer experience improvement and customer-centric training and content. Through a trademarked process called Customer Experience Investigation™, 360Connex helps organizations around the globe discover hidden pain points and moments of opportunity in their customer's journey. 360Connex's mission is To Create Fewer Ruined Days For Customers™, resulting in stronger loyalty, increased conversions, elevated brand sentiment, and greater customer lifetime value. More at 360connex.com.

ABOUT CLICKTOOLS

Clicktools powers enterprise feedback for hundreds of companies worldwide. Across industries, the Clicktools platform enables organizations to collect, centralize, and act on feedback using surveys, call scripts, and web forms that integrate with leading CRM solutions. The company is owned by Callidus Software Inc. (NASDAQ: CALD), which operates as CallidusCloud®, the leading provider of sales and marketing effectiveness software.

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