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How To Lift Your Customer Survey Participation Rates

Meaningful participation rates are critical to every survey program. Here are some tips for best practice.

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PART 1:
Why Survey Participation Rates Are So Important

Customer feedback has become an essential component of modern business management. Feedback gives businesses an opportunity to resolve individual customer issues improve products and processes, coach frontline employees and measure customer loyalty as a view to the overall health of the business.

Without a customer feedback process, organisations, and particularly service businesses, are seen by customers, markets and industry, as out of touch and unresponsive.

Essential to establishing a meaningful customer feedback program is achieving rates of participation that unambiguously demonstrate that the insights and metrics gathered are representative, and that every customer has had an opportunity to have their say. Whilst most businesses have implemented structured customer feedback programs, many have struggled to receive adequate levels of participation, and consequently the programs have become neglected and stale, delivering little value to the business or the customer.

This e-book examines the main issues businesses need to address when designing and implementing their customer feedback programs in order to achieve high participation rates.

What Are Survey Participation Rates?

Survey participation is the proportion of survey responses compared to the number of survey offers made by the business. In organisations with modern VOC programs, a survey is offered at the conclusion of each interaction and/or episode, which results in the participation rate generally being calculated against the number of interactions the business handles.

Some business calculate participation rates against the completion of every applicable question of the offered survey. This approach results in inconsistent results as research clearly demonstrates that completion rates are very much a function of survey length and complexity.

Combining these approaches, survey participation rate can be simply calculated as the number of surveys with at least one question answered against the total number of interactions or episodes where customer feedback is offered.

What Are The Benchmarks For High Participation?

There are a wide range of factors that influence survey participation rates. The percentage of what should be attainable is therefore different for each business. The factors that may impact participation rates include:

- The specific industry, products and services
- The nature of the interactions customers make
- The overall customer journey and the points where surveys are offered
- The customer's perception of your brand and its values
- Survey timeliness and the channel on which it is presented
- Survey design and the method of presentation
- Ease of providing feedback
- Demographics of the population
- Survey promotion by frontline employee

The majority of commercial and government organisations struggle to achieve meaningful participation rates. Many battle to achieve more than 1% participation, while others are stuck between 1-10%. For these businesses, the value of their customer feedback is seriously compromised. As a rule of thumb in most industries with a high service element, a participation rate of 15% is acceptable, and in excess of 30% is seen as excellent. A rate greater than 50% is seen as exceptional.

Quality Of Insights

Customer feedback is used for many purposes, but when we use feedback to make important business decisions, we need to be confident that the data we are basing our decision on is accurate and represents what our customers really think. We all intuitively understand that the more survey responses we receive, the more likely it is that what we learn from the survey will be accurate; however, the statistical concept of sample size allows us to achieve practical confidence in data without a 100% response rate.

The Cochran formula is used to determine the ideal sample size. It provides a simple way to gain insight in to the 'quality' of our survey data. In simplified terms, at minimum to use this formula, we need to know:

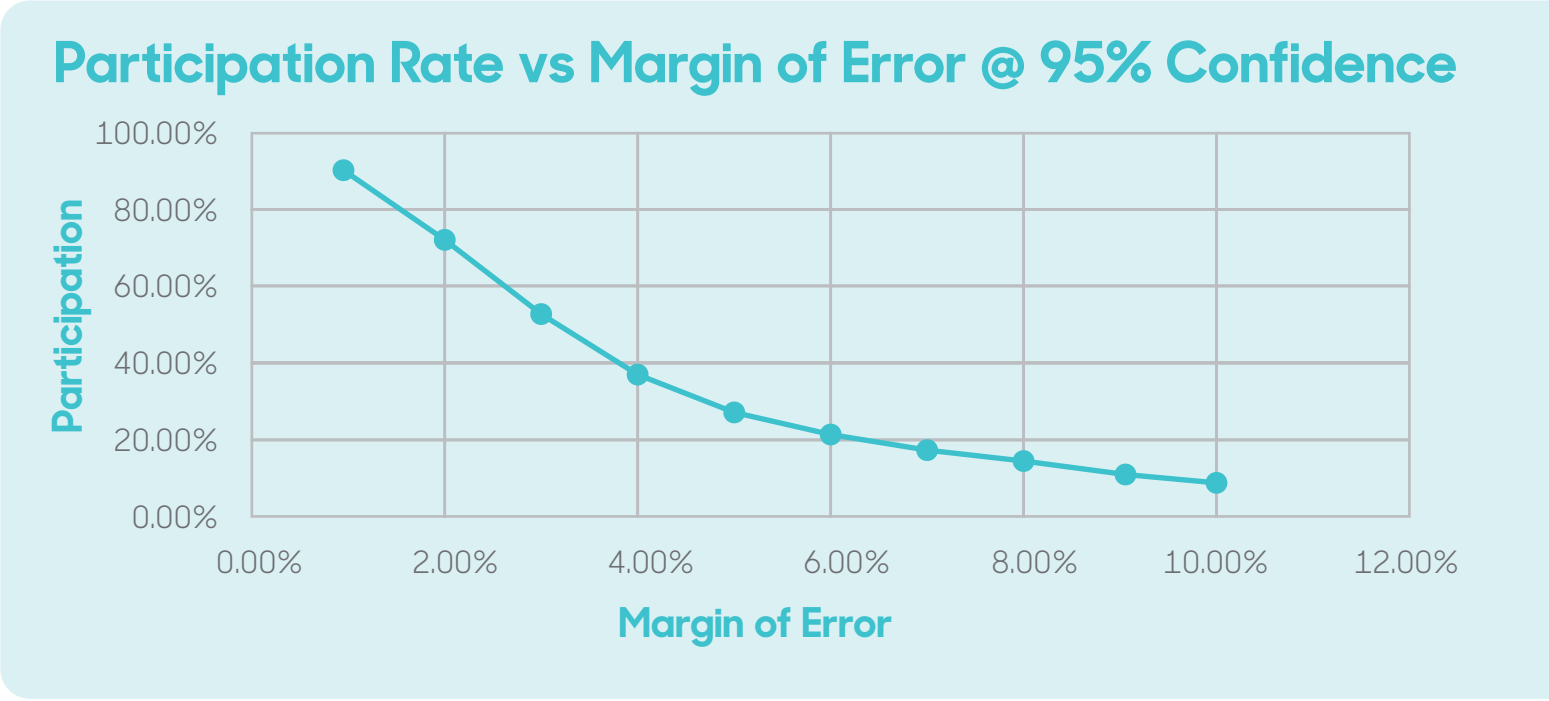
Confidence Level

Expressed as a percentage, this is the degree of certainty that we need to have in the result. In the scientific world, the 95% level is commonly used, however, business decisions are often made with far lower levels.

Margin Of Error

This is the percentage within which the result is found at the given confidence level. For example, a result of 50 with a 10% margin of error would mean that we could be 95% confident that the true result is between 45 and 55.

The chart below shows the participation rate required to achieve 95% confidence at each margin of error assuming a 0.5 Standard Deviation.



The acceptable margin of error and the confidence level will be different for every organisation, every survey question, and most significantly, for the importance and sensitivity of the decision that will be made from the data.

Consideration should also be made for 'non-responder' bias, that is the fact that the survey design or context may result in a particular group (that share some characteristics) simply not responding. Whilst every effort should be made to remove any logistical or systematic reason for this group's non-response, the higher the overall participation rate, the less likely that there will be a meaningful bias.

For many businesses, a participation rate of below 15% results in a margin of error that is unacceptable. A 30% participation rate is an excellent result that inspires confidence that the data is truly representative, and this level is often used as the target by many businesses for supporting decision making.

Whilst actively limiting sample size was an important cost concern historically when utilising expensive market research, the advent of operational VOC platforms has resulted in a low (if not zero) incremental cost for additional surveys. Today there is no reason not to target as high a participation level as possible to increase the quality of insights.

Customer Engagement

A high participation rate is a strong indicator of customer engagement with your business and your brand. Customers that engage with your brand are usually the same cohort that will also provide feedback. They care enough about what you offer to go through the effort to leave feedback that will help your business, and ultimately serve them in the long run.

By asking customers to reflect on their experience with your organisation, you are not only measuring customer engagement but actively engaging in setting their sentiment towards your brand. You are demonstrating that you care about them and their opinions.

A lesser understood impact of surveying is the effect it has on customers recollection of their sentiment towards their experience with your brand. With many transactional services, customers take the service for granted, and only tend to think about it when something goes wrong. This negative sentiment then becomes the key memory associated with the service in place of all the experiences where the expected service was delivered. By asking the customer for feedback with each interaction, you are helping them actively consider their sentiment and form a positive memory that can counteract negative experiences when they occur. You are creating a buffer against the inevitable poor experiences that will impact some customers from time to time.

Detractors Into Promoters

Customers that have negative service experiences, that are then positively addressed by the business, can be turned into the organisation's biggest promoters. This process creates a long-lasting sentiment that demonstrates the organisation's commitment to customer service and continual improvement. Key to enabling this process is ensuring that the business has ample opportunity to identify dissatisfied customers and address the concerns. A high survey participation rate provides confidence that every opportunity to enable this powerful process is being leveraged.

Compliance And Complaint Management

In highly regulated environments, such as financial services or health care, it is critical that the business can demonstrate to internal and external stakeholders that its complaint management process is effective. A high survey participation rate indicates that the complaint collection component of the complaint management process is effective.

Providing an effective complaint management process is equally important for ensuring the business's brand is preserved. An effective process can prevent customers utilising public forums such as social media and regulatory bodies as a complaint escalation mechanism that causes brand damage.

PART 2:
What's Holding Your Responders Back From Participating In Your Survey?

The key question to consider if your participation rates are not sufficient is what is preventing your customers from providing feedback. A few key factors that could be discouraging your customers from responding are:

Timeliness

Timeliness is critical to achieving high participation rates. The sooner after the event the survey is received, the higher the response rate. This is because the event is still top of mind and there might still be an emotional attachment to it. Commencing a new activity such as responding to an email survey days after a customer has called a business is seen as a whole new interaction, with a higher degree of effort for the customer.

However, in some circumstances, sending a survey too soon, before your customer has completed a follow-on activity might mean they have not yet formed a full opinion. Finding the balance is important, but when in doubt, earlier is generally better. These general principles might assist you in determining the best time to send your survey:

- If the survey is deemed a low priority or optional, it will be deprioritised, pushed back, and eventually forgotten by the customer.
- The strength of your customers' feelings about an event are at their peak closest to the event.
- The cognitive effort required by the customer to respond to events in the past is much higher.
- The timing of the survey offer must be convenient for your customers.

These principles generally come down to surveying immediately following an experience will produce the best results, however, if this is not practical then survey as soon as possible afterwards.

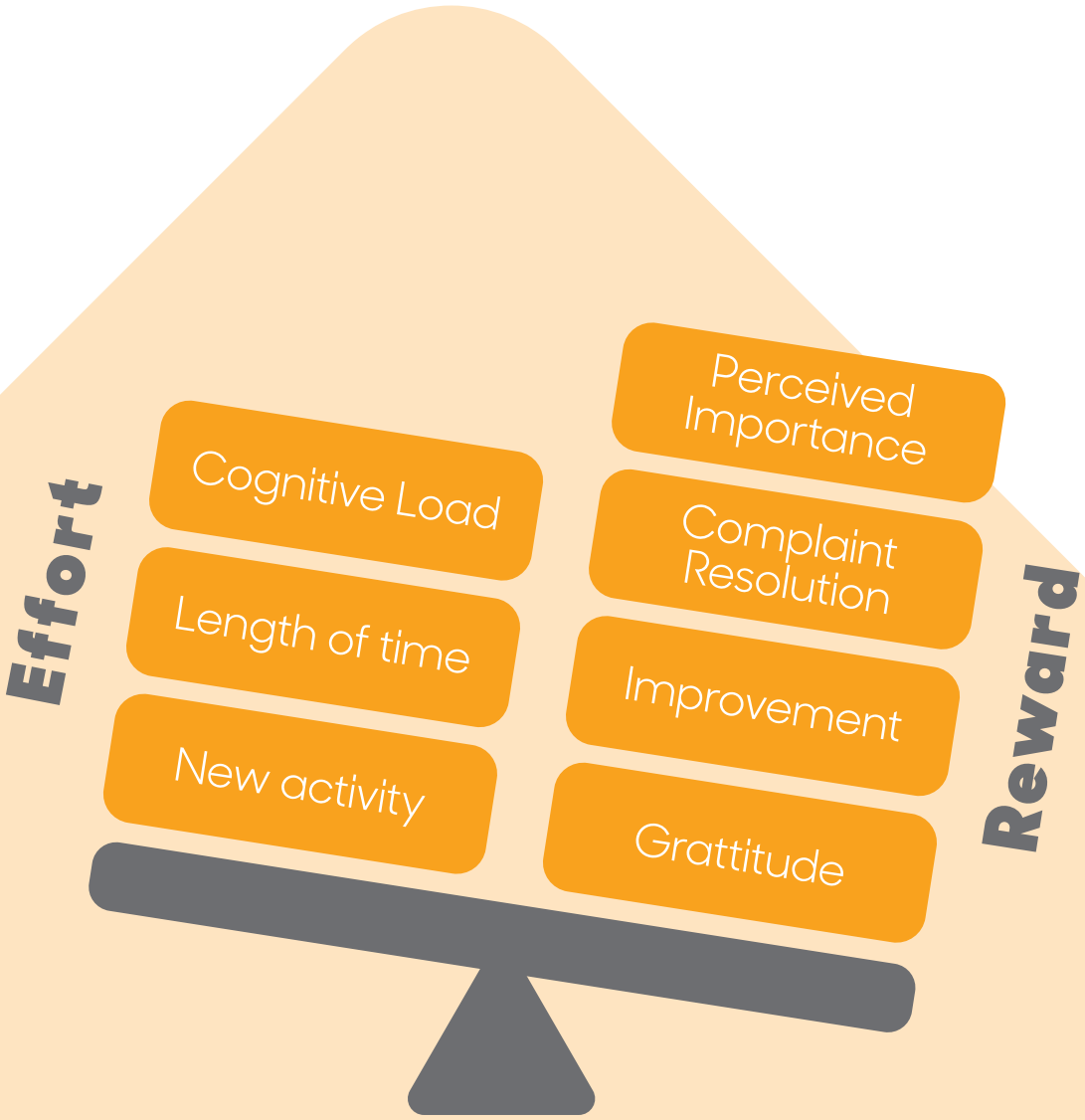
Employee Engagement

When surveys occur after customer experiences that involve your employees, the attitude and engagement of the employee can have a profound impact on participation rates. Employees that appear uninterested or apathetic will often have their attitudes mirrored by customers, resulting in low participation. Conversely, the opposite is true. Engaged employees not only reflect positively on your brand, but also encourage customer engagement broadly, and survey participation specifically.

The value of a personal request for feedback from an employee cannot be underestimated. It is a clear demonstration of employee engagement and creates a personal reciprocal obligation for the service provided. Actively engaging your frontline employees to ask for customer feedback achieves the highest participation rates.

Balancing The Reward For Effort Equation

As humans, we are constantly deciding what our actions should be by striking a balance between effort and reward. If customers are going to expend effort for your brand, they want to know that there is some form of reward in it for them, even if it's not tangible. If there is little perceived value in completing a survey, there is a higher probability that customers will not do it.



Examples of rewards that are appreciated:

Relevance

Surveys that are relevant to the customer and clearly address the specifics of their interaction or product are deemed to have a reward element in terms of relevance to the customer. Conversely, the surveys that are generic and non-personalised have a negative impact on the perceived value of the effort by the customer to complete the survey.

Perceived Reward

Some customers want to be acknowledged for completing your survey by receiving something in return. This doesn't have to be a financial reward and can take the form of recognition. Conversely a lack of acknowledgement for their efforts or time could be turning them away.

Complaint Resolution

In a complaint scenario, customers appreciate that their specific issue is considered and then resolved, and they feel valued because a team leader or manager contacted them.

Commitment To Improvement

Another reward that may be appreciated is communicating to customers as a group about the way their feedback has helped improve the customer experience. Being open to what customers say and demonstrating that the business is acting to improve their issues creates a sense of transparency and value.

Personal Gratitude

Humans experience positive emotions when sincere personal gratitude is expressed to them. It can be either written or verbal. Mass, impersonal communications are not sincere and do not help customers feel valued.

The converse side of reward is effort and it is worth considering how your approach may decrease the perceived effort associated with completing a survey.

Examples of high effort:

Difficulty In Completion

Surveys that are presented on interaction channels that are awkward or inconvenient for the customer will drive down completion rates. For example, requesting detailed feedback in SMS is a good example where usability can severely hamper the feedback process.

Other common mistakes that increase the difficulty in completion include asking the customer for unnecessary information or information that your business should already be aware of.

Survey Length

Surveys that are overly lengthy and repetitive will result in lower full completion rates initially and ultimately will act to lower ongoing participation rates.

Cognitive Load

Survey questions that rely on customers to exert effort to understand what the question is asking, or to contemplate their answers in a specific form, can create a much higher mental load. For example, asking a customer to respond to a question suited for an open response with a highly limited selection of checkboxes results in the customer having to think deeply about which category their response best matches. A customer who responds even to a short survey with poorly considered questions will feel like they have responded to a much longer survey.

Assumed Knowledge

Asking customers questions that assume knowledge on behalf of the customer can drive down completion rates. For example, requiring a customer to be familiar with a business's product catalogue or the name of internal systems can be needlessly confusing and drive customer frustration.

If it seems like there is too much effort required to fill in your survey, you'll find that participation rates will be low. The more you can reduce the effort required from the customer, the better.

PART 3:
How To Achieve Higher Participation Rates

Addressing the areas that prevent feedback is key to achieving high participation rates and keeping them there, by avoiding survey fatigue. In order to ensure maximum customer participation and high-quality feedback, the collection process should address the following:

Short, Sharp, and Frequent

Customer expectations of the survey before it commences are key in determining whether the customer will continue to provide a response. The customer's expectations are set predominantly by previous surveys from the business.

Best practice is to provide an opportunity for feedback at least with the completion of every meaningful interaction and possibly more frequently. The surveys themselves should be short and clearly relevant. For interaction surveys we recommend no more than a total of 3 metric based questions combined with 1 or 2 open text or verbal responses.

Immediacy And Speed Of Survey

Collect feedback as close to the trigger event as possible. If it is an interaction survey it should be immediately after the interaction. In this case even minutes count. Interaction and episode surveys must be easy and quick for customers to complete if high participation rates are to be maintained. It is important not to burden customers or survey completion rates will decline quickly.

Best practice is to incorporate the feedback into the interaction itself. This way, the customer does not see providing feedback as a separate activity. This will drive the highest participation rate. Examples include IVR surveys at the conclusion of a call, or web surveys at the conclusion of a webchat.

Response Convenience

When surveys cannot be incorporated into the service experience itself it is best to consider the customers convenience into the survey presentation.

Best practice is to utilise channels that allow the customer to complete the survey at their own convenience. For example, an email or SMS survey offer can be responded to at a time best suited to the customer. With outbound survey mechanism such as this, it is important to send communication at the right time of day. Not only will the improve response rates but customers do not appreciate after-hours communication from businesses.

Engage Frontline Staff

Those representatives of the organisation that are dealing directly with customers must be engaged in the end to end feedback process. This is critical to achieving high participation rates and making feedback actionable.

Best practice is for frontline staff to personally request that customers complete a survey at the end of their interaction with them. The emotional areas of the brain kick in and the customer is far more likely to complete the survey. This effect wears off over time, so combining this with timeliness is critical.

Same Channel Collection

Incorporating feedback as an intrinsic part of an overall product or service experience creates a positive customer impression and delivers higher participation rates.

Best practice for interaction surveys is that customer feedback should be collected on the same channels as the interaction itself. If the customer called your organisation, then a voice survey post-call should be used on the same call. If the interaction was email or webchat then that same channel should be used for the feedback.

Relevant And Personalised

Surveys must be immediately relevant to the customer and their experiences in order to minimise survey fatigue.

Best practice is that the survey offer should be highly personalised and where possible incorporating the customer's name and details of the service or product. This provides immediate indication to the customer that the survey will be relevant and there for meaningful both to the them and the business.

Consider What The Customer Wants To Tell You

Whilst every business has a specific view of the insight that they wish to gain through a survey it is important that customers are not frustrated by being unable to express their own views into a broader range of topics.

Best practice is that each survey should contain at least one open ended question that allows for free text (or verbal) response to incorporate areas of concern for the customer that may have otherwise not been addressed.

Easy To Complete

Survey and question design are complicated topics with many different schools of thought. Everyone agrees though that ease of completion is important regardless of the type of survey.

Best practice is to very carefully consider the survey specifically from the customer's perspective. Ensure it is clear and concise and places no unnecessary cognitive load on the customer. Never make a survey longer than it needs to be. Never force a customer to choose between options that may not suit their opinions.

Feedback On Your Feedback

It is easy to become hyper-focussed during the survey design process and lose sight of both your own business goals and the customer's experience.

Best practice is to always gather feedback about your surveys from an independent party to ensure that the clarity and relevance has not been lost.

Usefulness

Customers feel appreciated and heard when they know that their feedback will be read, analysed, and acted upon. They want to know that their opinions can be of use, especially if it is going to result in a more positive experience for them at the end of the day.

Best practice is to identify ways that their feedback has made an impact. Where changes have been made as a result of their feedback, these changes should be communicated back to them to show how their participation has been beneficial. This is an incredibly powerful and liberating feeling for a customer, and for the frontline staff member who communicates it to them.

Transparency

Actively promoting customer feedback results back to customers in a transparent way creates a self-perpetuating cycle. When customers know that their voices have an impact, they will use them more. This encourages customers to leave feedback, be fair in their appraisals, and it encourages new customers to do the same.

Best practice is to actively promote CX metrics to customers. This can be through promotional materials or even updated in real time through digital properties such as websites or mobile apps.

Complaint Management And Resolution

Asking customers for feedback creates an implicit expectation that any direct feedback such as a complaint will be addressed

Best practice is to ensure that every customer that states they would like to be contacted with regards to their responses, is contacted promptly. If you explicitly do not intend to contact dissatisfied customers, it is best to provide an escalation path within your survey.

PART 4:
How CentraCx Facilitates the Process of Achieving Higher Participation Rates

CentraCX VOC is a Voice of the Customer platform that helps organisations to collect, understand and drive action from customer feedback. It has been designed from the ground up to support a comprehensive, whole of business VOC program and drive high participation rates to make the program valuable.

CentraCX enables high participation rates by:

Immediacy And Speed Of Survey

CentraCX VOC's trigger API and prebuilt connectors enable surveys to easily trigger from any CRM, contact centre, content management platform or digital marketing system. By utilising the trigger API, surveys for real time channels like voice, webchat, mobile apps and SMS can be incorporated directly into the interaction flow, ensuring that the collection of customer feedback is simply a part of the original interaction. The trigger API also enables outbound surveys such as email and SMS to be triggered based directly by external platforms ensuring that surveys are delivered as close to the original interaction as possible or timed for delivery when the customer will likely be most receptive.

Same Channel Collection

CentraCX allows businesses to easily create and present surveys on any channel including email, SMS, voice, webchat, web and even within native mobile applications. Encouraging feedback on the same channel that the interaction took place is an important consideration for streamlining the customer experience, helping to ensure higher participation rates.

Ease Of Use

CentraCX digital surveys are easy to build for the administrator and easy to complete for the customer. With full support for branding and visual elements within surveys, the ability to create beautiful and functional surveys could not be easier.

Survey relevance and personalisation is built in to CentraCX VOC with each survey associated with extensible customer and interaction context information. This meta-data can be utilised to select the relevant survey to issue, within the survey offer and embedded in the survey itself.

Engage Frontline Staff

Tribal Analytics is a technology enabled process, unique to CentraCX, that presents feedback in real time to the staff members who are already invested in that particular event or transaction. For example, feedback collected from a customer purchase can be delivered directly to the department manager as well as the fulfilment team that may have served the customer. This immediately engages staff and helps them become part of the bigger picture that drives business success.

Real-time feedback is essential for ensuring that frontline context is captured, that staff members are dealing with matters that are top of mind, and that immediate action can be taken to address the customer's concerns. This personalised attention is part of the reward versus effort debate that customers experience. If they know that their concerns will be considered and actioned, they will be more open to participation.

Complaint Management Workflow

With a powerful workflow engine that utilises not just survey data, but the context information associated with each survey incorporated, CentraCX enables businesses to ensure that the actionable complaints are delivered to the right person in the organisation on a timely basis. Addressing customer complaints and closing the loop with employees across the business creates a self-propelling process that delivers high survey participation rates.

Ensuring higher participation rates for your surveys will give you the insights into your customer base that can transform the way you run your business. Following through with the best practice tips in this e-book is your first step in the right direction. To discuss any of the points raised in this e-book and find out more about CentraCX VOC, visit centracx.com.

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