

Survey Best Practices

Ask the right questions of the right people at the right time

1. Before deploying a survey, your first question must be – **What will I do with the feedback I receive?** *If you are unable or disinclined to act on what respondents tell you – don't ask.
2. Introduce your survey with invitations that clarify:
 - a. **What** – What is the purpose of your survey? What are you trying to learn?
 - b. **When** – What is the deadline for completing your survey?
 - c. **Why** – How will your survey positively benefit your respondents? How will you use their input to improve their experience?
3. **Close the Loop** on feedback. Show respondents you are listening by acknowledging their response with a follow-up message and by taking action on what they tell you. This is critical to survey management.
4. Surveys should be:
 - a. Short
 - b. Relevant
 - c. Dynamic
 - d. Open-ended

Longer surveys tend to either cover multiple topics or ask about the same topics several times in different ways, making for a redundant disjointed survey experience. Customers find this confusing at best and irritating at worst—making it less likely that they will complete the survey, give thoughtful feedback or take your surveys again in the future. It is better to have a small number of focused, highly relevant questions to keep customers feeling engaged with the survey. When customers feel like the topic is relevant to them, response rates have been has shown to rise between 14% and 16%.¹

5. Never ask a question you already know the answer to. (e.g. How long have you been a client? What department do you work in?)
6. Avoid:
 - a. **Anonymous surveys** – Survey responses should be confidential; however, if you make them anonymous, the source of the feedback collected is lost and you will be unable to closed the loop.
 - b. **Mandatory questions** – While this will guarantee you get a response, the answers might be invalid because respondents feel forced to answer a question.
 - c. **Absolutes** – Words like “always,” “all,” “never,” and “every” are too rigid and push respondents into a corner where they don't feel comfortable giving feedback. Instead, use a scale, asking respondents to rate the intensity of their feelings or the frequency of a specific behavior.

¹ Clarabridge Ultimate Guide to Survey Success

- d. **Closed-end questions** – Failing to include open-ended follow-up questions results in missing out on the richest insights from verbatims. Verbatims allow customers to provide context around why they are responding a certain way.
- 7. Contact the Client Experience Team for assistance with survey design and deployment:
clientexperience@texascapitalbank.com