Your Top Customer Experience Management Question Answered

Improving Response Rates for Email Based Surveys

A Guide for Program Managers

By Deborah Eastman, Chief Customer Officer, Satmetrix

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For program managers of customer experience programs, survey response rates offer a vexing and ongoing challenge. Among the top questions we receive in a range of settings: "What response rates should I expect?" and "How can I improve the ones I have?" The challenge of driving higher levels of participation from customers is only increasing as surveys become more pervasive, and customers become overwhelmed with requests to provide feedback. This guide provides some best practices for improving your response rates to email-based surveys.

Let's start with response rate benchmarks. Satmetrix has found the following average response rates to email based customer surveys:

	B2B	B2C
Relationship	32%	13%
Transactional	23%	16%

How does your response rate compare? If your rates aren't where you'd like them to be, this guide provides helpful tips for improving your rates of response in surveys.

Sample for Success

Before you can send a survey, you must select an audience. Survey recipients contact information is typically pulled from your CRM system.

How accurate is your CRM data? Are you inviting the right people?

Maintain Data Quality

In B2B relationship processes, your account teams should be accountable for ensuring data quality. Once you define your sampling strategy, i.e., the number of contacts and titles by account tier, your account managers should verify the selected CRM data is accurate.

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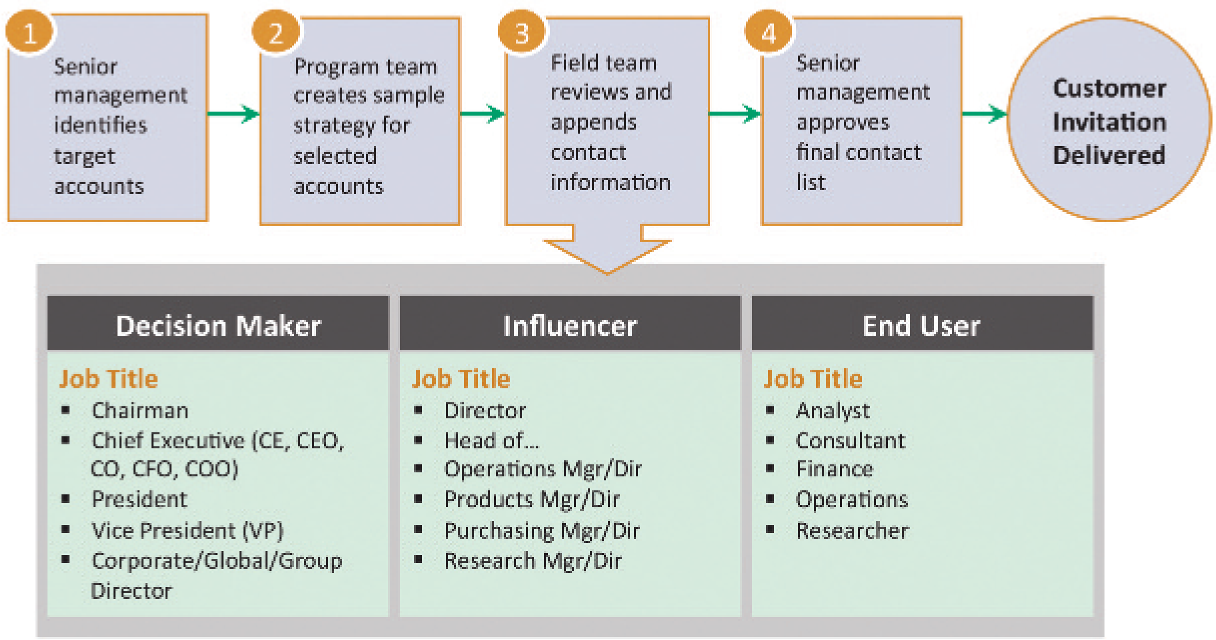
After contact data extraction, the account manager should review the contact list prior to sending survey invitations and actively recruit customer participation. Business leaders then sign off on removal of any contacts and review the final contact file. This gets business leaders to validate the data you get back is of value and also protects from gaming.

B2B Sample Review



Thorough review of B2B survey contacts using a process like this one is your first step toward great response rates.

Select Quality Contacts

In B2C relationship processes, be sure you leverage the best data source and choose survey respondents with an eye toward gathering the highest quality insight for your business. Some program managers are concerned that they cannot use contacts that have opted out of marketing email. Remember, this is not a marketing activity. You are not trying to sell them something; you are trying to improve their experience. This is a benefit to them.

In either B2B or B2C, check your bounce rates and identify contact owners who can address any bounced email addresses. Be sure to remove any invalid addresses from your source system to avoid the issue in the future. This is the first filter of optimizing response rates.

Design for Deliverability and Beyond

Time Your Delivery Properly

In a transactional environment (either B2B or B2C), be sure to send your survey immediately after the customer's experience. Transactional surveys should ideally be sent within a day of the transaction, and within a week at the most. Sending the survey too long after the experience will impact your response rates, as the customer no longer sees it as relevant.

In relationship surveys, be mindful of seasonality or business cycles. Avoid holiday seasons, and if you are global, this means understanding holidays across the world. For example, sending a B2B relationship survey during August in France or much of Europe would likely result in very low levels of participation.

Avoid Spam Filters

Are your email invitations spam resistant? Make sure your invitation makes it through spam filters and to your desired contact. Words like "survey" are spam magnets, so be sure to test your invitation subject lines. Use email marketing best practices to drive higher open rates.

Keep Invitation Text Relevant

Be sure your survey invitation is compelling. Keep it short and to the point, but explain to the customer what's in it for them. Ideally, your invitation text should:

- ✓ Reassure that the survey will only take a few minutes
- ✓ Inform that responses guide strategic investments
- ✓ Define a timeline for communicating identified actions
- ✓ Provide examples of previous improvements based on customer feedback
- ✓ Include an email address to submit questions (i.e. customerfirst@brand.com)

Make it clear that you are doing something with the responses you receive, not just collecting a score.

Compare Click-Through Rates and Survey Completion

If your customers open your survey and then abandon their response, your survey may prove to be an issue. Areas to investigate include:

- ✓ Are the questions relevant to the respondent?
- ✓ Is it in their native language?
- ✓ Is the length appropriate for the level of interaction?
- ✓ Have you invited the right people? This is particularly relevant in B2B.
- ✓ Have you surveyed them too frequently?
- ✓ Has the transaction been completed?
- ✓ Are they still a customer?

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Be sure to understand click-through rates before you assume your survey length is the reason for your low response rates. If customers don't click through, survey length is not a factor in your response rates. It's likely the other factors noted here.

Avoid Survey Toxicity

Survey toxicity, which lowers response rates, results from over-surveying customers. Establish touch rules that define how often you can send a survey to the same contact. These touch rules should extend across all surveys to that customer and should not be fragmented across your organization.

The general rule of thumb would be 90 days, but as with everything there are exceptions:

- ✓ In B2B relationships surveys we typically use 6 months. In B2C relationships surveys extend this to 12 months, as your relationship is typically of lower value to both parties.
- ✓ At key moments of truth, such as insurance claims, you may not apply any touch rules as every interaction could be significant enough to impact retention, and the survey process gives you an opportunity for service recovery through your closed loop process.
- ✓ For support or call center experience you may select 30 or 60 days, or you may decide your sample strategy should trigger surveys based on the severity of the request. You want your sample to include a balance between high severity issues and "how to" type requests.
- ✓ Be sure to review your touch rules across surveys. For example, you may want to exclude some participants in your transactional survey to ensure proper sampling for your relationship survey.
- ✓ Determine your survey prioritization. For example, onboarding or new customers may take precedence over everything else. Create a hierarchy of data collection needs aligned with your business and apply the touch rules to the most important areas.
- ✓ Understand the sample volume requirements for each touch point. If you need more volume in a particular area that is being starved due to touch rules, reprioritize accordingly.

Communicate for a Strong Relationship

Establish Benefits with Relationship Survey Pre-Notification

Before you send an invitation for a relationship survey, send a pre-notification from someone the customer will recognize, for example your CEO, country manager, or business leader. Let them know the survey invitation is coming and what your process is for taking action. The simple rule of "what's in it for me" applies.

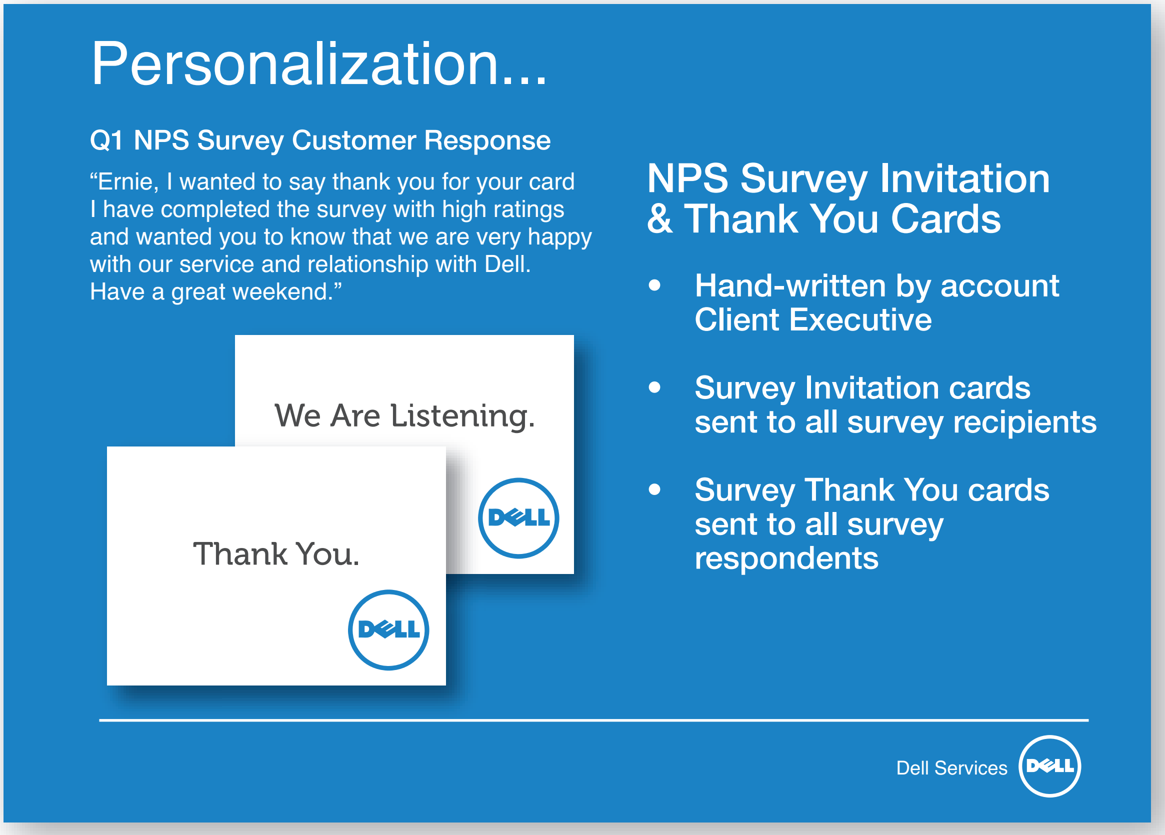
In general, we advocate sending the pre-notification from your email-marketing platform instead of your survey vendor. Your message should include “you will soon receive a request to participate in a brief survey from Satmetrix (or other tool)”. This illustrates to the customer that the upcoming invitation is genuine and isolates issues between the communication, message, and the technology platform. This also gives you the opportunity to test your contact quality, as you will be able to quickly evaluate email deliverability. The following sample provides some guidance.

> Dear [Contact Name],
>
> We are requesting your feedback on your overall experience with BRAND. You may have recently provided us with feedback based on a support request, or service engagement, but we’d like to understand how we are performing across all interactions with our company so we can prioritize our improvement areas, and continue to support the areas that matter most to you.
>
> Next week you will receive a request from Satmetrix (or other technology) to provide your feedback via a brief survey. The survey will take just a few minutes of your time. Your account team will follow up on any specific items, and we will communicate back our overall actions toward the end of December.
>
> Many of our experience improvements have come from previous feedback, including improving the onboarding experience, adding the new customer success team, and significant product enhancements such as self-service and performance improvements. You will also see significant enhancements to the end user experience in our upcoming product release.
>
> Thank you for being a valued BRAND client. We look forward to hearing from you.
>
> Sincerely,
>
> Company Executive

Recruit Participants

In B2B relationships, we find active recruitment of your key decision makers and influencers to be critical to gaining participation. Account teams should let the customers know the process is kicking off, ask for their participation, and tell them what to expect. Account teams should receive daily reporting of non-respondents during the survey window (typically 3-4 weeks) so they can follow-up during the survey wave and remind them to participate.

Holding account teams accountable for participation rates is a much better strategy than holding them accountable for the score. The score is an aggregation of the customer's overall experience; the account teams are best placed to help drive participate so you get a full view of your performance. Providing account teams with collateral for your program will also help support their recruitment efforts.



Dell Services account executives extended personal invitations and personal thanks via handwritten cards.

Dell Services set an excellent example related to recruitment, as well as follow up. They had their account teams hand write notes to their most important customers to help drive participation. As a result, they achieved in excess of 50% response rates for senior executives at their most strategic accounts.

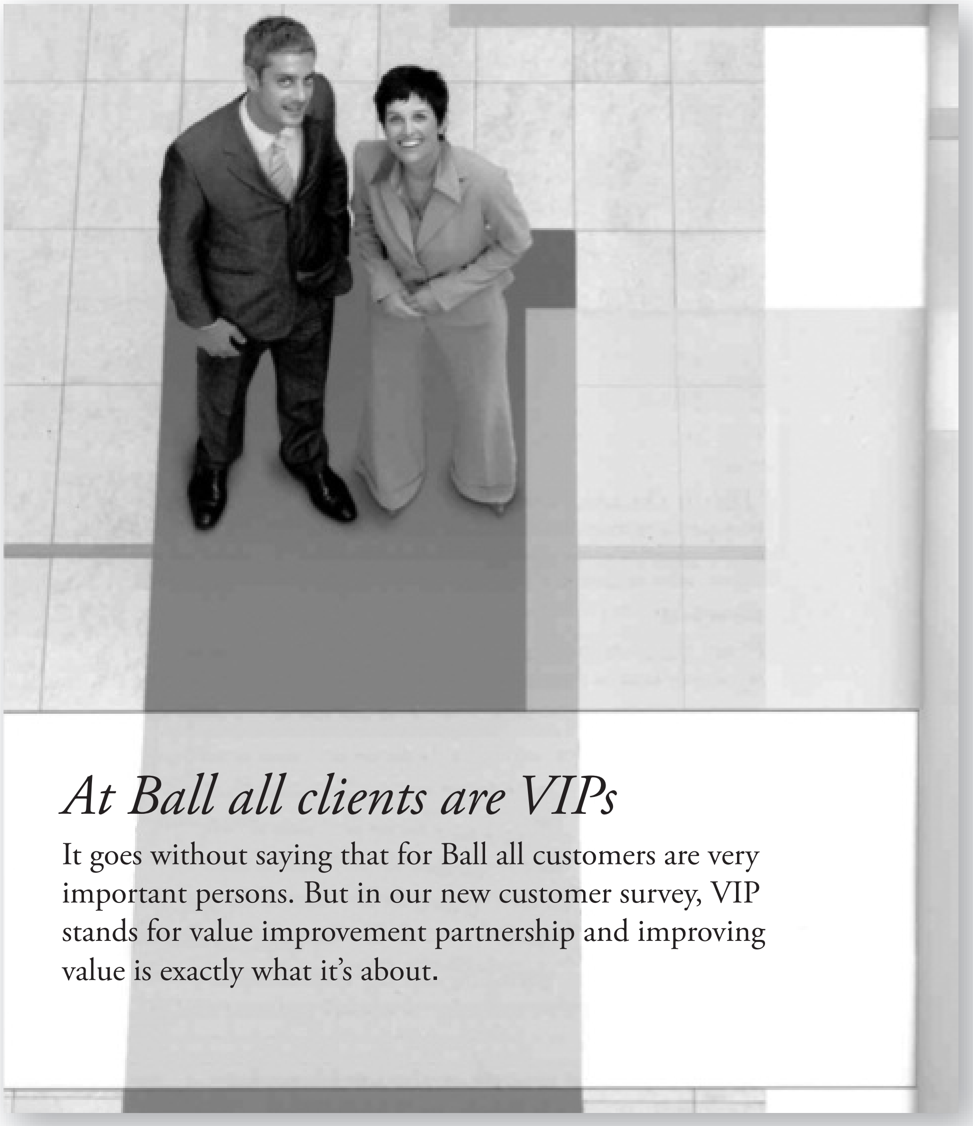
In transactional environments, frontline staff can inform the customer that they will receive a request for feedback and encourage them to participate. They should re-iterate that the information is used to improve their experience, and they should never, ever suggest that the customer give them a high score or game the system. Gaming offers no benefit to the company, and degrades the customer experience.

Provide Collateral

Providing account teams with marketing collateral of your program will also help support their recruitment efforts. This shows customers the importance of your program and clearly lays out the steps your organization takes to use the feedback to improve their experience.

This type of collateral also works equally as well in a branch or retail operations to explain to customers what your process is for using the feedback. It may be displayed at point of sale, provided during an interaction, included in shipment, or included as part of your regular customer communication. Consider it a form of marketing if you believe that delivering a positive experience results in repeat purchase and recommendation.

When developing collateral, be sure to share improvements you have made as a result of customer feedback to demonstrate that you value their time and are committed to action.



Ball provided collateral introducing customers to the benefits and processes of its customer feedback program.

Encourage Participation with Reminders

Sending an automated reminder email with the survey link 3-5 business days after the initial invitation is reasonable. Select shorter time periods for transactional, and send within a week for relationship. Reminders should, once again, communicate the importance of their feedback. Best practice suggests one reminder for transactional surveys, two for relationship surveys.

Demonstrate Commitment Through Action

You should always communicate back to customers what you learned from survey responses, and what actions you are committed to take to improve their experience. Include non-respondents in your communication; this will make them more likely to provide feedback in the future, and often gives a slight boost in their loyalty ahead of experiencing any structural improvements you have committed to. Too many organizations miss this very important step.

In B2B environments, account teams should discuss results in periodic business reviews, or other customer meetings, with both respondents and non-respondents. This allows them to have a strategic dialog with customers outside the sales or service engagement, and demonstrates your commitment to customer experience. Arm your sales team with supporting materials to support this discussion.

Support your sales staff in their strategic conversations with customers by providing helpful materials, like this example from CHEP.

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Focus for Success

Response rates are a challenge. In this document we have provided some examples of what other companies have done to drive participation. There is no silver bullet. Focus on three key areas:

- ✓ Contact quality and selection. Make sure you are sending to the right contacts.
- ✓ Designing for relevance and engagement. Be sure your survey is sent at the right time, and is relevant to your target audience.
- ✓ Communication, communication, communication. Communication happens at every step of the way, from pre-notification through closed loop communication.

Over time, your customers will see that you are not simply collecting a score for your benefit, but you are truly committed to improve their experience. After all, isn't that what it's all about?

About Satmetrix

Satmetrix's industry-leading customer experience management (CEM) solutions help companies of all sizes capture, analyze and act on customer feedback for successful customer experience programs worldwide. Clients such as Experian, Dell, TW Telecom, Kronos and Aggreko have enjoyed increased customer loyalty, improved retention and long-term financial growth by using our products. As co-creators of the Net Promoter® Score (NPS) methodology, the worldwide standard used to measure, understand and improve customer experience, we offer the only official NPS-based CEM software solutions. Visit us at www.satmetrix.com for more information.

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