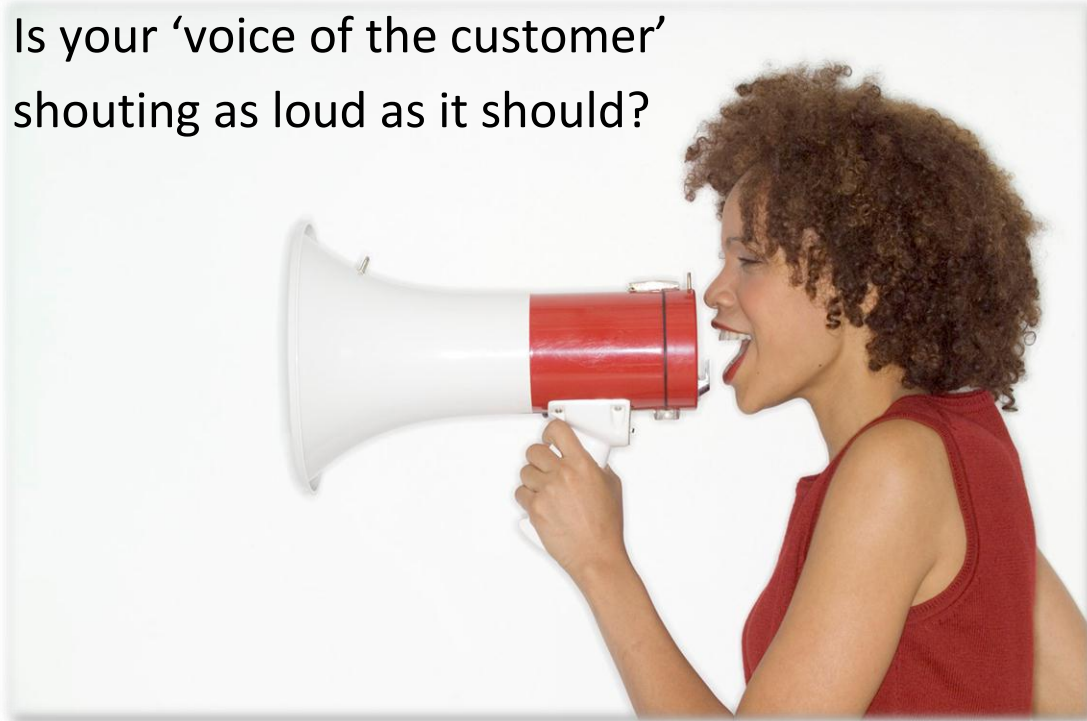# Is your 'voice of the customer' shouting as loud as it should?

Setting the bar for 'typical' feedback survey response rates and identifying how these can be improved.

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Contents

1. Abstract

New feedback technologies have dramatically improved the quantity and quality of insight that companies can generate. But some brands are still unsure about the volumes of response they should expect from online, email and IVR surveys. The questions we hear most often from our clients are 'What response rate can I expect?' and 'How can I improve my response rate?' This first annual white paper explores the issue of response rates based on a year's worth of surveys delivered by ServiceTick. It compares response rates from IVR, online and email surveys and draws conclusions about what level of expectation you should set. It identifies the differences in response caused by the day of week on which surveys are delivered and investigates the issue of survey abandonment (respondents who begin a survey but don't get to the end). It looks at the thorny issue of 'cherrypicking' – agents only transferring respondents to an IVR survey who have had a positive experience – and explains how this can be eliminated. It goes on to propose a number of ways in which response rates for each of these technologies can be improved and gives pointers about the best way to structure a feedback survey to ensure reduction in the number of part completed surveys.

2. Acknowledgements

Thomas Cowper Johnson began his career in the research team of the London office of leading US ad agency Doyle Dane Bernbach. After 14 years on the agency side of the fence he joined Norwich Union (now Aviva) where he established and ran their brand marketing team as Director of Brand and Communications. He has since advised UK companies on their brand and marketing strategies and has been a director of ServiceTick Ltd for the last 5 years.

ServiceTick Ltd. is a market-leading Customer Experience Management solution that generates actionable insight and transforms customer feedback and online behaviour into profit. ServiceTick's enterprise level software generates immediate insight by gathering customer feedback across web, branch and call centres and presenting it in a single, online data management console. Clients can benchmark service levels and clone best practice across brands, distribution channels, call centre teams or agents. ServiceTick's Customer Recovery solution alerts clients in real time to dissatisfied customers allowing recovery processes to be initiated.

ServiceTick delivered over 5 million surveys in 2011.

3. Health warning

Search online for definitive treatises on survey response rates and you are likely to find opinions, points of view and guesstimates based on the experiences of individuals, organisations and academics. It's difficult to find 'market standard' information because response rates vary significantly depending on the nature of the product, the relationship between brand and customer, the structure and logic of the survey, the technology being used to gather feedback, the profile of the audience and even the touchpoint of the customer journey.

Given this range of influencing factors it would be misleading to suggest there is a level that you can expect to achieve by following set guidelines. But the lack of a 'market standard' does not deter people from asking 'what sort of response rate should I be getting?' In an attempt to answer this question we have reviewed data from a year's worth of surveys delivered by ServiceTick on behalf of its clients. These encompass IVR, online and email surveys; but they are also surveys that reflect the interests of the clients who commissioned them (clients from financial services, travel, leisure, retail, local government and other sectors). Strictly speaking the results are not directly comparable but they do provide a benchmark across a wide range of survey types that may give a reference point.

We would also note that the response rates cited in this paper for IVR surveys are not directly comparable with response rates for online and email surveys. With online and email surveys we can monitor how many are delivered and how many are responded to; so here the response rate equation is:

$$\underline{\textbf{Survey responses X 100}} = \textbf{Survey response rate \%}$$
$$\textbf{Surveys delivered}$$

So if we deliver 100 online surveys and get 15 responses, the response rate is 15%

With IVR surveys the equation is different because our overall response rate is based on surveys delivered to respondents who typically have agreed to participate in the survey. Customers and prospects are asked if they want to take part and then either manually transferred by the agent or automatically called back at the end of the survey. In this instance the response rate represents the proportion of those who have already agreed to participate who go on to take the survey. The equation is as follows:

$$\underline{\textbf{Survey responses X 100}} = \textbf{Survey response rate \%}$$
$$\textbf{People agreeing to participate}$$

We intend that this will be the first annual report on response rates and that we will update the findings each year.

4. The growth of new feedback technologies and their impact on customer experience

The growth of new technologies for gathering customer feedback has been instrumental in moving customer experience up the management agenda. According to a recent poll the most important industry trend in call centres is 'Customer experience improvement' (outscoring 'Business process optimisation', 'Multichannel development' and 'legislation/compliance'). Most customers now have a customer experience initiative in place and there is a growing cadre of individuals and groups whose roles have stepped outside the traditional silos of marketing, customer service or customer research in pursuit of a single 'Voice of the Customer' view.

The latest ESOMAR Global Market Research report describes how online methodologies are continuing 'their inexorable growth at the expense (primarily) of telephone and face to face'. Globally, online surveys now account for one quarter (24%) of all research expenditure; and in the UK online surveys account for 23% of the £1.99bn that is spent on research.

ESOMAR does not break out a figure for IVR surveys but evidence suggests that IVR is increasing in popularity as a way of gathering feedback in call centres.

Growth of the new survey technologies has gone hand in hand with the standardisation of brand and transactional performance scoring systems like Net Promoter Score (NPS) and Customer Satisfaction. These allow businesses to benchmark performance across business units within an organisation and also with competing brands in the same sector. 80% of ServiceTick clients now use C-Sat and/or NPS to measure performance, using the data to inform a wide range of management strategies: tracking 'voice of the customer'; improving service delivery; shaping training and remuneration policies; and driving culture change.

5. Response rates by technology
In our review we have looked at the three main types of survey technology used by our clients – online, email and IVR. Table 1 shows the overall response rates by each technology. Overall response rates are significantly higher for IVR for reasons that have already been explained – they measure the proportion of respondents who have already agreed to participate who then go on to take the survey. So, in our experience online surveys generate a response rate of about 5% and email will deliver 9.3%. With IVR surveys 70% of those who say they will participate actually do.

Table 1 – Response rates by survey technology
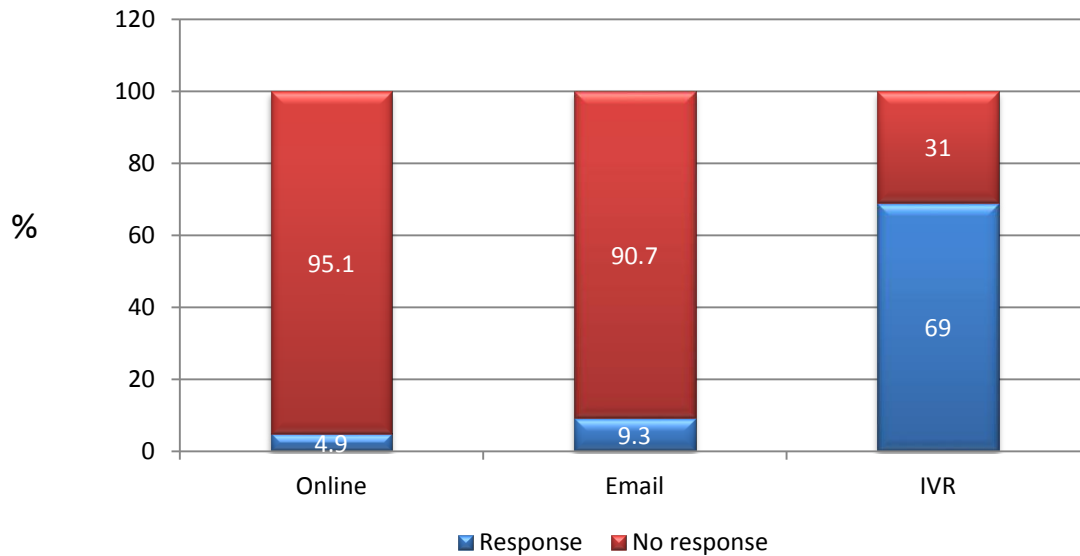
Conclusion - email surveys generate a response rate almost double that of online surveys.
The reason for this lies in the fact that email surveys are typically sent to a known, sometimes named individual (a customer or prospect who has a pre-existing relationship with your brand and is therefore more likely to offer feedback); whereas online surveys will present themselves to web visitors who may be unknown to you, without any personalisation and in a way that interrupts what the visitor was doing.

6. Part vs. full complete rates

Customer Experience professionals also need to understand the extent to which surveys are either fully completed or part completed – not everyone who starts a survey gets to the finishing post. Table 2 shows the full and part completion percentages for each survey technology. For online surveys 0.7% of all surveys delivered are part completed and 4.2% fully completed (so 86% of people who start the survey get to the end). For email the part completion rate is 1.4% and full completion is 7.9% (so 85% of people who start the survey also complete it). With IVR the part completion rate is 24.9% and the full completion rate 44.1% (so 64% of those who start the survey reach the end).

Insight 1 - Cost does not always equate to value when comparing customer feedback technologies.

Different technologies deliver different value in terms of quantity of response as well as quality. Response rates are part of the equation but not the full picture. Online surveys are simple to run and deliver but will not provide the depth of insight generated by an IVR survey. The relative ease with which IVR surveys can capture verbatim comments adds a layer of richness to NPS and C-SAT scores.

Table 2 – full and part completion rates by survey technology
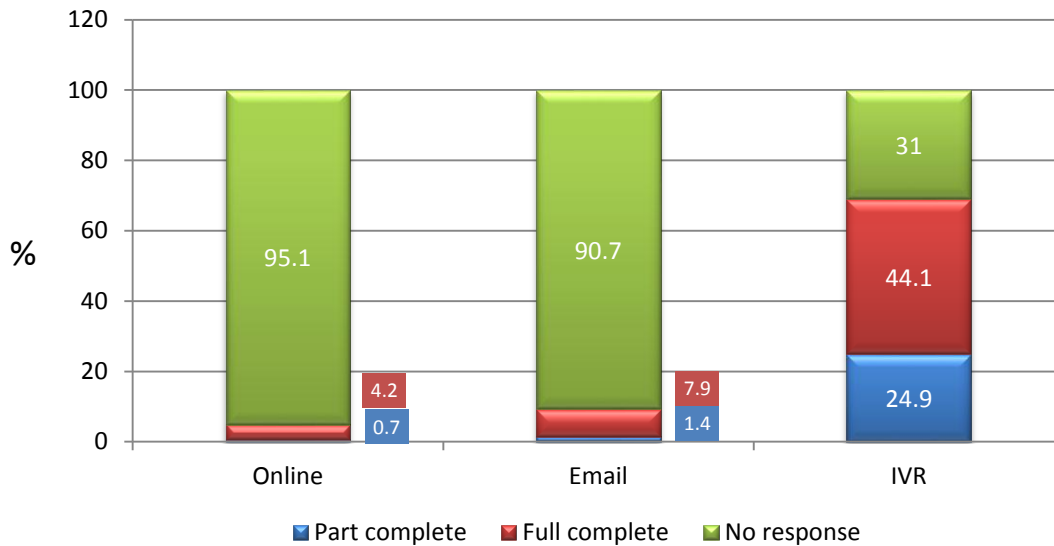
Conclusion - Online and email survey participants are more likely to complete a survey than IVR survey respondents.

Insight 2 – even a part completed survey can have substantial value. If the respondent answers only one question and that delivers a key organisation-wide metric (e.g. NPS) then the survey has been worthwhile. Alternatively a respondent may only get as far as the first question in which he expresses extreme dissatisfaction with the quality of service and the reasons why he feels this way – before putting the phone down or clicking away from the survey. By gathering and analysing responses in real time companies like ServiceTick can trigger the immediate implementation of customer recovery processes that win back the approval and loyalty of the disgruntled customer.

Our experience is that online and email surveys tend to be shorter, more focused and therefore easier to complete. They will also rely more on a 'tick-box' approach. IVR surveys typically include a greater number of questions some of which will require a verbatim response. These can prove a deterrent to completing the survey.
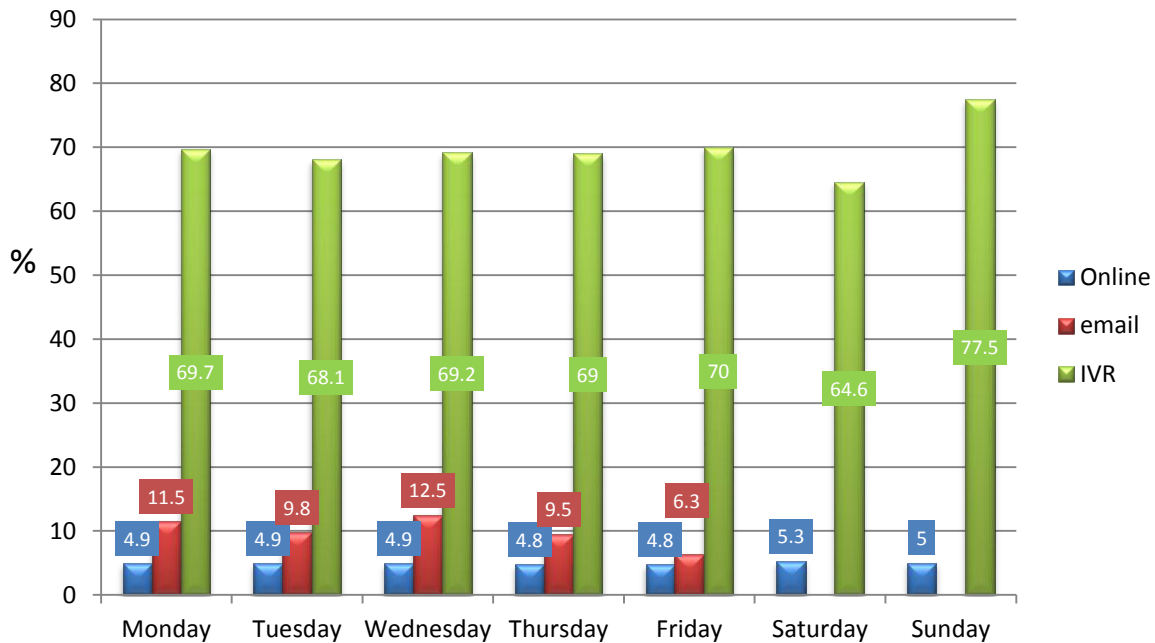
7. Response rates by day of week

Much is written about the impact of 'day of week' on email responses so it comes as no surprise that survey response rate can also be affected by day of week.

Table 3 shows the total completion rates (both full and part) for survey methodologies by day of week. (Email surveys are not sent at the weekend). Online response rates show little variation across the week (although there is a slight increase on Saturdays). IVR survey response rates are also fairly static across the five working days of the week and show a slight decrease on Saturdays and increase on Sundays.

Email survey response rates show the most variation with the highest response rate being achieved for emails sent on a Wednesday and the lowest for those sent on a Friday.

Table 3 – survey response rates by day of week

Conclusion - The day of week that you choose to deliver your survey can impact response rates. Best days of week for email survey response are Monday and Wednesday.

The response rates for email surveys shown above are based on the day on which the email is sent. Typically only about 50% of email survey responses are made on the day the email is sent and the completion 'tail' can be very long indeed as people come back to the request to participate in their in-box. ServiceTick has examples of survey responses being made over a year after the email was sent (though not in enough volume to significantly affect findings). Table 4 shows the 'tail-off' for email survey response activity by the number of days after the original email was delivered. 84% of all

Insight 3 – Session replay tools (which can record and replay every visit by every visitor to your website) can dramatically increase the performance of your online survey. They record and replay the actual journey that every respondent takes through your online survey. This lets you:
*• View individual survey attempts*
• See how long people take to complete each question
• Explore whether they travel through the survey as you expected them to
• Identify obstacles in survey logic
• Spot where people fall away from the survey
You can also use SessionCam to evaluate the online delivery of the survey – does it appear at the right point in the customer journey? Does it match the look and feel of the site that hosts it? How long does it take people to engage with or delete the survey?
Armed with this insight you can make immediate improvements to the structure and flow of your online questionnaire, improving response and completion rates and making sure the quality of your customer feedback is enhanced.

responses are received within a week of delivering the email but there is a significant blip even two weeks after the initial delivery (people catching up with emails on their return from holiday)

Table 4 – Email survey response by number of days after delivery.

Legend: % of all responses received
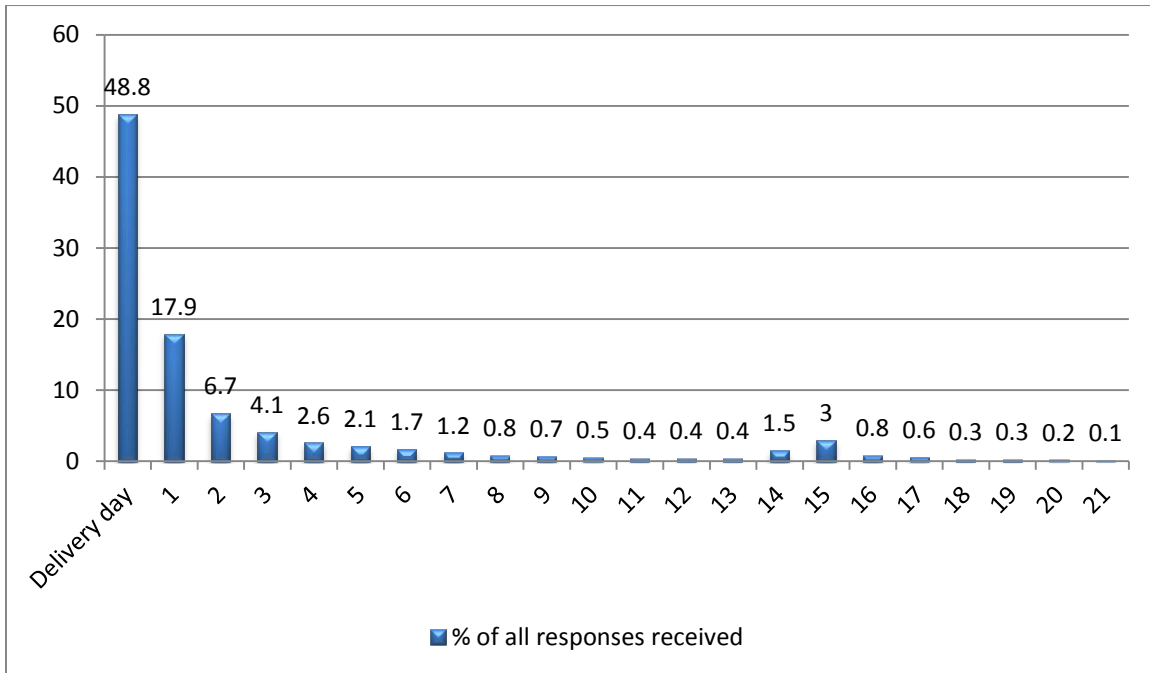
Conclusion – Over 16% of all responses to email surveys can arrive more than a week after the initial survey was delivered

8. Improving response rates

For the past 5 years we have been helping some of the UK's best known brands gather and understand customer feedback. In doing so we have learnt, by experience, how to improve response rates from feedback surveys. Listed below are our top ten tips for getting maximum responses from the investment you make in customer feedback.

Online surveys

a. **Don't ask for feedback as soon as a visitor lands on your site -** visitors object to being asked for feedback the instant they land on your site. Let them accomplish what *they* planned to, and then you will be entitled to politely ask for feedback. This may relate to overall site look and usability or to the usability of a specific online process or form. Aim to deliver your survey as a pop-under rather than a pop-up so it is not so 'in yer face'.

b. **Don't abuse visitors' willingness to offer feedback -** Once someone has agreed to give you feedback you probably have less than 60 seconds of their attention. Make sure the questions you ask are easy to answer, intuitive and short. Don't ask more than a dozen questions – maximum. And nearly all of those should be capable of one-click answers.

c. **Keep scoring scales consistent –** If you are asking visitors to rate satisfaction with processes and usability make sure the scoring range remains the same (we recommend a 5-point Likert-type

scale). And be sure to keep the values consistent – if 5 is 'very satisfied' it should be so for all questions asked.

Email surveys

d. **Monday or Wednesday is best –** sending your emails on a Monday or Wednesday could improve response rates by up to 25%. (Remember that your survey or respondents may show different characteristics to our 'norm'. You need to trial different days to find out which works best for you.

e. **Personalise your emails –** Personalisation works. If you can remind people that you already have a relationship with them already they will be more likely to give you their feedback.

f. **Patience is a virtue –** don't assume that you'll get all your feedback on day one. More than 50% of feedback will be given after the day you send the email. 12% of responses could arrive more than 2 weeks after you sent the email.

IVR surveys

g. **Ask the key question first –** if there is one piece of feedback that is more important (for example a Net Promoter Score that may determine call agent bonus or be used to measure operational performance) make sure you ask it first. Drop-off rates in an IVR survey show a gradual increase question by question.

h. **Keep it short –** Your customers are busy people. They may be happy to give up a couple of minutes of their valuable time to offer feedback but don't push your luck. Questionnaires that probe every single aspect of a transaction or brand relationship and go for longer than 2 minutes will see high fall-out rates.

i. **Keep it fresh -** Consistency of question format and survey structure is vital for reviewing trends. But you also need to ensure that your questions remain relevant and topical. Avoid the twin traps of not regularly reviewing your survey or doing something 'because that's how we've always done it'. Use A/B survey testing to experiment with different survey logics and structures and find out which works best for you.

j. **Make sense –** your questions should be couched in language that respondents understand. We recommend NPS and C-SAT questions because they are intuitive; respondents are well used to being asked 'How satisfied are you....' or 'How likely would you be to recommend...' and will feel they can respond.

9. Beating the cherrypickers

Some customer experience professionals express the concern that agents in call centres can cherrypick the calls they transfer to a survey – only handing off those where the call has gone well and the respondent is more likely to give a positive score. In our experience this happens less than is feared but we do recommend a number of techniques to ensure the practice is eradicated. Here are five ways that ServiceTick recommends to challenge the cherry-pickers:

a. **Commitment before comment** – Get commitment to the survey at the front end of the call and you remove the opportunity for the agent to cherry-pick after the event. Respondents can be asked at the start of the IVR script if they would like to participate in the survey. If the answer is yes a data feed can run from the client's telephony system into ServiceTick and we can outbound the customer with an automated survey request once the call has ended.

b. **Zero tolerance** - Make the survey invitation a mandatory part of an agent's closing script. If an agent is heard not to make the survey invitation through silent monitoring or other Quality Management systems it is classed as a serious performance issue.

c. **Naming and shaming** – The ServiceTick management console will let you analyse call agent statistics and interrogate a league table of agent performance based on actual customer feedback. Comparison of data will allow you to identify where a particular agent might be cherry-picking (for example where an agent is recording fewer surveys but these have consistently higher results.)

d. **Shaping the culture** - Create an environment where call agents understand the benefits of 'Voice of the Customer' feedback and actively encourage it. There's no such thing as bad feedback especially when agents can grow and learn from what customers are saying about their performance.

e. **Offering a carrot** – a simple but effective way of encouraging feedback from all calls is to offer incentives for the call agent who puts through the most IVR survey responses.

Customer feedback is a key driver of profit in today's service-centred business world. Customers feel valued when brands seek their opinion and inviting feedback both positive and negative is a simple way of increasing the level of trust in your brand. (Bill Gates knew that: "your most unhappy customers are your greatest source of learning"). With the tools now available any company can build an extensive and effective customer feedback programme; and, so long as they act on the information received, they can enjoy the significant benefits of a strong customer relationship.

10. About ServiceTick

ServiceTick Ltd. is a market-leading Customer Experience Management solution that is focused on transforming customer feedback and online behaviour into profit.

ServiceTick's enterprise-level software breaks down the traditional barriers between web, branch and call centres by generating immediate and actionable insight from customers interacting with your brand across all channels. Web-based and IVR technologies capture customer feedback at the actual point of experience and carry it, in real time, to an online data management console. Clients can benchmark service levels and clone best practice across brands, distribution channels, products, call centre teams or call agents.

ServiceTick's voice-to-text capability allows call centre operations to identify disgruntled customers in real-time and implement recovery processes that turn complainers into brand advocates.

ServiceTick Ltd's online solution, SessionCam, will record, analyse and replay every journey made on any website. The aggregated journey data provides an unrivalled view of online customer behaviour that lets clients gather 'voice of the customer feedback', enhance web usability, create remarketing opportunities and improve conversion rates and customer support.

ServiceTick provides actionable insight and effective ROI for many of the UK's leading brands including Aviva, Tesco, British Gas, Lloyds TSB, RAC, Joules, W M Morrison and Anglian Home Improvements.

For more information about ServiceTick visit www.servicetick.com or call +44 (0)1603 618326.

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