Customer Management Kit

Stephen Larsen and Co
TAX AND BUSINESS ACCOUNTANTS

Customer Management Kit

Introduction

This kit has been prepared for the purpose of readying you to provide great customer service.

Notes:

1. Electronic versions of all documents are available.
2. Please contact us for further queries or support with growing your business.

Contents

This kit contains the following topics:

Customer Service Guide

Introduction

Good customer service is easy.

Once you have been through the hard work of attracting customers, and have successfully sold them something, you will want to encourage repeat business. It is far easier to sell more to your existing customers than it is to find new ones.

One of the keys to attracting new customers and keeping existing customers is your customer service.

Good customer service is very easy to give, whereas changing a customer's mind once you have let them down is very very difficult.

Plan your business' customer service culture and stick to it. Post a list of customer service tips in your staff area and ensure everyone follows them.

Contents

This guide contains the following topics:

Set your service up right

Start with the right people	All team members who come into contact with customers, particularly reception, front of house and sales people, need to have the right attitude. You can give a team member more skills and knowledge through training, but a good attitude cannot be taught. If a team member has a negative attitude, or worse, no attitude at all, move them away from the customers before it impacts on your business.
Educate your team	Your team members should be armed with as much knowledge as possible. If a customer has to go somewhere else for the information they need e.g. the internet or another business, you have lost them. Give your team the tools and authority they need to look after customers well.
Reward and recognise	Recognise your team members' outstanding customer service and publicly reward them for it.
Happiness is key	Happy team members = happy customers = happy business. Focus on making your business a happy place to work and the rest will take care of itself.

Planning your customer service style

What is a style	You may already have your own style, but it is important as a business owner, that all of your staff take a similar approach to customer service. This generally falls into one of two categories: The Best Mate or the Butler.
The Best Mate	One successful approach to customer service is the Best Mate approach. This is where you treat your clients as equals, but as good friends who you would do anything for. You may tease them and push the boundaries, but never lean into the disrespectful. When you build a community of customers who see you as a friend, they are more likely to take your advice, trust your judgement and also bring their own friends into your circle. The best mate approach relies on trust so keep your promises. Give your clients the heads up when your have a new product or service you think they'd enjoy. Keep their experience personal and ensure your team members know the client's name, preferences and can help the customer just as well as you can.
The Butler	The Butler approach is about good old-fashioned service. Clients are addressed as Sir or Madam and introduced as Mr or Mrs. The Butler is knowledgeable but subservient, and is polite and patient at all times. The customer feels special and valued and knows they're in capable hands. They won't hesitate in recommending your business as you're the soul of professionalism. The Butler approach relies on discretion and professionalism, so no banter around the clients or gossip. Always ensure everything is followed up and right the first time. This approach works well when each team member has certain clients they look after – the client feels special and the business holds a certain type of exclusivity.
Conclusion	In reality most business' customer service culture floats between these two and the nature of the business and the personality of the business owner will generally determine what approach the customer service takes. The main thing to take away is that the entire business' customer service needs to be consistent across all team members. If a team member is not naturally suited to a customer service role, some things can be learned, but the safest solution is to move the team member into a role with less client contact.

Top tips for great customer service

Listen	No matter what the client is saying, you need to be completely present. Listen to what they have to say and respond accordingly. The customer is not the enemy. Orders, invoicing, pricing and quoting can wait – the client talking to you should always be your sole focus.
Acknowledge	If you have walk-in customers ensure they are always acknowledged immediately. But be careful sales staff – you don't have to harass them to let them know you're aware of their presence. If a client emails, email them back immediately, even just to say you will follow up tomorrow.
Help	Consider yourself there to solve problems, whether you are solving the problem by providing the right product or service, or by making a phone call to a distributor, service provider or business associate.
Keep your promises	We've all heard it before – under promise and over deliver. Never ever promise something you cannot deliver on. If you do promise the world to make a sale, be prepared to make it happen personally, don't expect someone else to make it happen for you. If you say you'll call back by 3pm, call back by 3pm.
Follow up	If you pass something on to a third party, always ensure you know the outcome for your customer. Don't let another business' poor customer service affect yours.
Be professional	You can be friendly without being unprofessional. Malicious gossip, complaints and general griping have no place in customer relationships.
Value	Even if the client or prospective client is not buying something from you right now, they may come back and they will certainly tell others if you treat them badly. All queries have merit. If you can help someone on the spot, even for free, they will come back and bring others. Value every customer whether they are paying you money or not.
Don't judge	Never take a client at face value. The scruffiest, most downtrodden-looking person may be a business-savvy millionaire. The well-dressed, charmer may be a thief. Treat every customer as you would expect to be treated and refrain from passing judgement.
Keep cool	No matter how frustrating a situation, never get angry or defensive. Your client may be having a terrible day and you are just bearing the brunt of it. Maybe a product has broken or a service has been performed badly. Don't take it personally. Be a practical problem solver and take it as a personal challenge to send them away with a smile on their face.

Delivering great service

Mystery shopper	If you need to spot-check your business' customer service, consider hiring a mystery shopper to go through a typical customer experience. Have that person report back on how they were treated and what they experienced. Start with a phone call where the shopper asks a prescribed question and then have the person walk in off the street and make an appointment or shop for a product.
Put systems in place	Professional customer service relies on good systems that all team members follow, for example procedures for answering the phone in a professional manner or greeting customers when they walk through the door. No matter who a customer deals with in your business, they should receive the same high levels of service. Having a basic systems manual and some checklists will help your team deliver consistently good customer service.

Mystery Shopper Checklist

	Comment	Rating out of 10 (0 = terrible, 10 = superb)
Phone service		
Swiftness of phone answering		
Professionalism		
Helpfulness		
Accuracy		
General comments		
Walk-in service		
Time elapsed before acknowledged		
Professionalism		
Helpfulness		
Attitude		
Attentiveness		
Ambience		
Cleanliness		
Product/service knowledge		
General comments		
Appointment service		
Appointment on time		
All issues covered		
Product/service knowledge		
Professionalism		
Helpfulness		
Attitude		

Follow-up/after sales care		
Follow-up expected (please comment)		
Expectations met		
General comments		
Overall experience		
Attitude		
Professionalism		
Helpfulness		
General comments		
Completed by:	Date:	
Checked by:	Date:	

Appointments Checklist

Details to consider when taking appointments ✓

It is important that appointments are taken in a professional manner and that all parties are consulted.

1. If you are not the receptionist, or do not have access to the calendar of the team member whom the appointment is being made with, fill these details out and give to the receptionist.		☐
Client name		
Meeting with (team member name)		
Date		
Time		
Location		
Duration		
2. If a client requests an appointment and the suitability of that time can't be confirmed, book a tentative time. Contact the client within 2 hours to confirm a time.		☐
3. Where appropriate when a team member has more than one appointment in any given day, ensure that at least one hour is left between appointments ▪ This ensures clients will not be kept waiting for appointments that run overtime ▪ Also, it does not force an appointment to end mid-conversation because time is up		☐
4. Send confirmation of appointment via letter, email or text message. Include: ▪ Details above ▪ Parking instructions ▪ Any materials the customer must bring		☐
5. Book meeting/conference room if required. Ensure all resources are available e.g. ▪ Speakerphone ▪ Projector/ big screen ▪ Computer ▪ Whiteboard		☐
6. Ensure any necessary documentation is prepared in advance of the meeting. This may include a Meeting Agenda.		☐
7. When a client arrives for their meeting follow the contact checklist.		☐

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Contact Checklist

Checklist to ensure all customer contact is professional ✓

1.	The reception area must be attended at all times, even when there are no visitors due.	☐
2.	Ten minutes prior to appointment check the appointment schedule and note the names of the person/s coming in. ▪ That will allow you to greet them by name ▪ Also check the client database to see if they have any preferences for their refreshments, e.g. tea, white with 2 sugars	☐
3.	When a client walks through the door, smile and give a warm, friendly greeting. ▪ If you recognise the person, and are expecting them… *'Good morning/afternoon [Person's Name]. Are you here for your [Time] appointment with [Name]? I'll let them know that you've arrived.'* ▪ If you can, always greet a visitor by name	☐
4.	If you don't recognise the visitor, check to see if they have an appointment. If you haven't met the person/s before, introduce yourself: *'Good morning/afternoon, I'm [Name], how may I help you?'*	☐
5.	If the person/s doesn't have an appointment, ask how you can help them. ▪ If possible locate the person most likely able to deal with their inquiry ▪ If that person is not available, and no one else can help, take as many details about the purpose of the visit as possible ▪ Let the client know the appropriate person will call within 24 hours	☐
6.	Offer a drink and refreshments using a menu.	☐
7.	Tell the team member who will be dealing with the visitor they have arrived. Be sure to announce the visitor with their names: ▪ E.g. 'Jane and John Smith are here to see you', not 'The Smiths are here'	☐
8.	Arrange any refreshments.	☐
9.	The visitor should be kept waiting for no more than two minutes by the team member that they are here to see. ▪ Should the team member be running late, give the visitor an accurate waiting time. That way they may choose to run other errands rather than waiting in the office	☐
10.	At the completion of the appointment, escort clients to the door. ▪ Ensure they are clear on the directions for how to leave the premises	☐

Completed by: ______________________ Date: ______________________

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Telephone Answering Checklist

Checklist to ensure calls are answered professionally ✓

1.	Always keep an up to date list of people who are out of the building, in meetings or not taking calls: ▪ This will enable you to either put the call through or respond in the appropriate way	☐
2.	Ensure that someone is available to answer the main telephone at all times.	☐
3.	Smile before you pick up your phone.	☐
4.	Answer your phone at the end of the first ring as this is the 2nd ring for the caller.	☐
5.	The Greeting: ▪ *'Good morning, [business name], this is [First Name, Surname]'* ▪ Also refer to the Helpful Telephone Guidelines script	☐
6.	Listen attentively, give out positive strokes, do not interrogate.	☐
7.	Use question softeners like: ▪ *Could I just ask?* ▪ *Tell me* ▪ *By the way* ▪ *Incidentally*	☐
8.	Give out little bits of information at a time.	☐
9.	Talk in plain English. Clients do not appreciate technical jargon.	☐
10.	Regularly check to see how the caller is feeling: ▪ *How does that fit in with your schedule?* ▪ *How does that fit in with what you had in mind?* ▪ *How does that sound?* ▪ *How comfortable are you with that way of doing things?* ▪ *How do you feel about that?*	☐
11.	For a new client, take all necessary details: phone, email etc.	☐
12.	For existing clients, confirm the details on the client database are correct.	☐
13.	Confirm the time that you will follow up any queries the caller has.	☐
14.	All telephone messages are to be returned the same day.	☐

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Client Databases Guide

Introduction

A robust and detailed client database is an important tool for any business.

There are many types of databases that a business may use depending on the type of business and the computer applications available.

Contents

This guide contains the following topics:

Database basics

Data	The data that is recorded and tracked can vary widely depending on the business area, geographic location and target market. The core areas that databases record generally cover: ▪ Contact details ▪ Customer preferences ▪ Communications history ▪ Sales history ▪ Actions ▪ Payments Databases can also record additional details specific to the business, for example, a bike shop may record whether a customer enjoys mountain-biking, road cycling, competitive track cycling or triathlon. A contracting business may record ongoing service contracts. Hair salons may record details of previous hairstyles.
Purpose	When you have a robust customer database you are able to: ▪ Provide after-sales and follow up service ▪ Track complaints, service issues and repairs ▪ Follow buying patterns and preferences ▪ Communicate and market to your clients ▪ Target your marketing ▪ Encourage loyalty and repeat business

Types of database

General	There are myriad types of client database programmes available, and some businesses may choose software which is industry-specific. For example Hairware, Menumate and HirePOS. There are some standard systems which can also be tailored to suit a business' requirements.
Manual system	This is the most basic and non-integrated system of database, generally consisting of an excel spreadsheet of customer details, a quote book and a returns/repairs book. This may be fine for some businesses, but unless the spreadsheet is very complex it will not be useful for much more than mass mail-outs.
Access database	Most businesses with Microsoft Office will already have Microsoft Access, which is a very good database program. The program does come with some wizards to help you set up databases, however once they're set up they will need someone with good computer skills to customise and maintain them. You can produce excellent reports and specific information, but again this will require someone with great technical skills and possibly a lot of time.
Basic contacts database	There are also specific contacts-database programmes available online which are out of the box solutions that can be easily customised to service such tasks as bulk mail-outs and email marketing initiatives. Much of this software is free, however may not be as helpful as industry-specific or CRM software.
CRM system	A Customer Relationship Management (CRM) system is a purpose built database geared toward sales. This type of database records detailed information about clients including sales information and tracking. A CRM system is the best available for a sales database, however it may be excessive for businesses whose main focus is not sales. There are many CRM products available online or from software retailers. Systems can be in the cloud, server hosted, or simply on one computer. Pricing plans range from per user/per month basis, to boxed software that needs updating every couple of years. Most CRM systems generally integrate with Microsoft Outlook for accessing email, calendars and contacts. Many CRM systems also have integrated email marketing ability.
Accounting software database	Many companies have accounting systems where all their clients' details are recorded for billing purposes. Most of these types of databases also have the ability to add unique fields and record additional information outside of the accounting data. The benefit of using an accounting system is that you can tell when a client last made a purchase, however the drawback is that it may not be as sophisticated or customer-oriented as a full CRM system. Accounting systems are available out of the box or as cloud solutions.

Computerised point of sale systems	POS systems are excellent for retail/wholesale businesses as they generally record comprehensive client details, sales histories and often make loyalty and reward systems easier. POS systems are excellent for retail/wholesale and food service businesses. Again these are available out of the box or as cloud solutions.
Industry-specific systems	The world is full of software developers and there's a high possibility that someone out here has designed a customer database with your business in mind. The challenge is finding them. Search the internet for "customer database software for [your business type]" and see what you get. There are plenty of software development companies in New Zealand doing some great things.
Custom built solutions	If your business is unique or you have special requirements you may wish to consider having a database built for you. This may be more effective than an out-of-the-box solution, cheaper than an industry-specific solution and less time-consuming than building your own Access database. A custom solution may set you back anywhere between $1,000 - $10,000 depending on how sophisticated it needs to be and how many users you have. If you choose this path you will need to be very sure of what you need. Write a detailed plan and brief for a software developer to follow.
Using multiple systems	You may find that an accounting system is not flexible enough, or a CRM system is too sales-oriented, so you choose to run multiple systems. There is nothing wrong with this, in fact it may give you the greatest range of options. However you will need to be careful about maintaining your databases and ensuring they all have the same details.

What to record

General	Before you choose a system, it is a good idea to sit down and work out exactly what you need to record and how you want to use it. For example: ▪ Do you just want address details for marketing? ▪ Do you want to start a rewards programme? ▪ Do you want to set up client appointments? ▪ Do you want to record purchases?
Standard details	▪ Name, address and phone details ▪ Company details ▪ Email and website ▪ Contact (e.g. emails, phone calls etc)
Personal information	▪ Birthday ▪ Age demographic ▪ Preferences
Business information	▪ Contacts ▪ Roles ▪ Business size
Sales information	▪ Purchases ▪ Orders ▪ Quotes ▪ Returns and repairs ▪ Enquiries
Service information	▪ Appointments ▪ Contracts ▪ Documentation

Maintenance

General	If you are going to lavish time, money and effort on setting up a client database, don't simply forget abut it once it's in place.
Nominate a champion	You will need to assign the database management to one person in your business and ensure that they maintain the database – or databases – in a systematic fashion. Poor database management can have flow-on effects for marketing, loyalty programmes and communications, so regular maintenance is critical. A well-maintained, easy to use client database is an asset to any business.
Maintain as you go	As well as having one person who looks after the customer database, all team members who have direct contact with clients should check details such as postal and physical addresses, email and website details and phone numbers whenever they speak to a client.

Database Management Checklist

	Checklist to ensure client database is well managed	✓
1.	**Ongoing maintenance** Enter client or prospective client details at any opportunity: ▪ At point of sale ▪ When an enquiry is made ▪ Search for an existing contact before adding a new one	☐
2.	If it has been a while since the client has been in contact, confirm details when they next get in touch: ▪ *'Are you still at [address] [name]?'* ▪ *'And do you have an email address?'* ▪ Make sure you fill as many gaps as you can ▪ Don't forget postcode ▪ Double-check address on NZ Post online Postcode Finder	☐
3.	**Monthly maintenance** Manage duplicates in your database. Most database programs come with a function that will find duplicate records for you, based on certain criteria. If not, you can sort the information by various fields to find duplicates. The three searches that will turn up most of your duplicates will be searches for: ▪ Same first name and last name and company name, then ▪ Same last name and company name, then ▪ Same first name and company name ▪ Email address (but watch for couples who share one email) Each of these searches, done separately, will usually find all duplicates: ▪ Waiting too long to remove duplicates on your database can lead to a lot of confusion when you are trying to look up information about an individual ▪ Removing duplicates once a month will make it easier for you to determine which to keep and which to remove	☐
4.	If you use an email marketing programme, ensure you run a monthly 'unsubscriber' report: ▪ Your customers legally have the right to unsubscribe ▪ It is a good idea to record this in the database for future reference	☐
5.	Never delete a person from your database unless that person has passed away. Instead, create a category which shows that person should not be contacted: ▪ If a person is removed, and later a team member asks if that person is on the database, you may add them back on ▪ You may end up with an angry call or email from that contact asking why you contacted them when they specifically asked you not to	☐
6.	If you do not have a regular backup system, ensure you copy your database files onto a removable drive or flash drive and keep it somewhere safe: ▪ Do this once a month if not weekly	☐

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Loyalty & Rewards Systems Guide

Introduction

Loyalty and rewards systems are a very real part of customer service in a modern business.

Depending on the type of business you conduct, you may use one, or a combination of systems.

Contents

This guide contains the following topics:

What is a Loyalty System?

Definition	A loyalty system is a system whereby you encourage your clients to stay loyal to your brand and business. Many businesses refer to their system as a 'club'.
Encouraging loyalty	You naturally encourage loyalty from your customers by providing: ▪ Excellent service ▪ Quality products and workmanship ▪ Fast turnaround times ▪ Accurate work and information ▪ Reasonable prices ▪ Sound advice ▪ A real relationship ▪ Trustworthiness However, in a competitive day and age you may need to reward your clients as well as simply offering these qualities.
Referral systems	You may also want to reward clients who refer others to your business. A formal referral system will ensure that clients who recommend your services are rewarded for their trouble. Common types of referral rewards include: ▪ Free services ▪ Subscription costs refunded ▪ Gifts

Types of systems and rewards

Loyalty stamp cards	This is a very low-cost loyalty card system which is common and works well in food service and retail. A business card sized card is made up from heavy grade paper with squares on the back to be clipped or stamped. For every predetermined amount a client spends, a stamp is given or a square clipped and once the card is full the client earns a reward. Typical rewards: ▪ A free item e.g. cup of coffee ▪ A store credit e.g. $50 off the next purchase Pro: This approach requires little setup Con: Customer details are not often recorded Real life example: Baker's Delight
Loyalty software with swipe card	With an integrated loyalty software system, customers are given plastic loyalty cards which are linked to a customer database. This approach suits larger retail and wholesale businesses. The cards are scanned or swiped with each purchase, purchases and amounts are recorded, and details can be entered or changed at point of sale. Customers earn points or are given rewards at certain milestones e.g. $250 worth of purchases. Typical rewards: ▪ Gift vouchers ▪ Store items Pro: Integrated with client database Con: Potentially expensive and requires staff training Real life example: PostiePlus
Instant voucher	Some businesses prefer to reward their customers instantly by giving a voucher as soon as the transaction is complete. This works well in retail. This is an excellent way to encourage repeat business. For example every customer who spends over $200 receives a $20 voucher to use with their next purchase. Pro: This approach requires little setup Con: Customer details are not often recorded Real life example: Don Bayliss

Birthday reward

Many businesses record customer birth dates and send the customer a voucher or offer as a birthday present the month of their birthday.

This system not only works well in a retail environment, but also in food service or entertainment.

A report is run once a month and every customer with a birthday in the coming month is sent a voucher or offer, irrespective of purchase history.

Pro: This approach is relatively easy to set up

Con: Customers are not rewarded for increasing purchases

Real life example: Breakers Cafe & Bar

Trade/bulk discount

Many wholesale businesses use a trade/bulk discount system in which the customer signs up as a trade customer and in return receives a permanent discount and special offers.

This system often uses a loyalty card system similar to a typical retail business.

Pro: Appeals to repeat business for large quantities

Con: Applicable to a select type of business

Real life example: Placemakers

Affinity programme

This is an advanced loyalty card system where the customer climbs through ranks depending on amount and frequency of purchases, e.g. Bronze, Silver, Gold, Platinum etc.

The customer not only receives regular reward benefits, but special offers, further discounts, insider information, event invitations and also the prestige which goes with having a ‘gold card’.

Pro: Encourages an elite view toward loyalty

Con: Requires much more organisation and planning in relation to rewards and events.

Real life example: Overland Footwear

Referral reward

A referral reward is where a business rewards both the referring customer as well as the new customer. This is a very easy and effective way to bring in fresh customers.

This is a great reward programme for a service provider, however works well with retail also.

Pro: Brings in new customers

Con: Requires a double-reward

Real life example: Sky TV

Managing Queries & Complaints Guide

Introduction

Queries and complaints are a reality in any business.

A well handled query is a great step toward increasing business, just as a well handled complaint can prevent you from losing business.

It costs fives times as much to gain a new client as it does to retain an existing one.

Professionalism and follow-up are the two keys to successfully managing queries and complaints.

Contents

This guide contains the following topics:

Managing queries

Train front of house/reception team	A large proportion of client queries will come through a front of house role. Whether this is the person who answers the phone or staffs the front desk, it is important that this person is courteous and helpful. It's a good idea to train front of house staff to answer frequently asked questions. Consider writing a basic document of 10 frequently asked questions – this will be invaluable. Don't forget to keep your team in the loop of any marketing or media which may generate phone calls and enquiries. Any person who makes an enquiry should be added to the customer database if not already there.
Advanced queries	Ensure that team members know the correct way to pass a query on to another team member if need be. Email is the best way to pass on queries as they can be easily read and tracked. Include: ▪ Name of person enquiring ▪ Phone number ▪ Email or address if relevant ▪ As much detail about the query as possible ▪ Level of urgency
Follow up	It is imperative that all queries are answered in a timely fashion, whether the answer is what the customer wants to hear or not. After a query is answered, it may also lead to a sale or the engagement of a service. It is important that this is passed on to the relevant team member to follow up.
Take a universal view	Take a universal view of enquiries. What else may interest the customer? What team members need to know that an enquiry has been made? Think about what flow-on effect the enquiry may have and who may be interested that the enquiry was made.

Managing complaints

Attitude

Don't think of a complaint as necessarily a bad thing. The customer is not the enemy and it often takes courage for someone to voice their displeasure.

Although there are always serial complainers, 90% of those who complain just need your help and are disappointed or frustrated with something.

Clients generally want less than you think and will probably be complaining in the hope of remaining a client with you. You need to be sincere and to want to help them, because if you don't this will come across in your voice.

You need to solve the problem using the following steps to try and ensure that the client becomes or remains loyal:

- Establish a rapport
- Discover the problem
- Offer a complete solution
- Cement the relationship

Look at a complaint as an opportunity to improve part of your business.

Professionalism

It is imperative that complaints are handled professionally and with a set process to ensure that nothing is misplaced.

If there is someone in the business more appropriate to deal with the complaint, pass the customer on immediately so that the customer does not tell their story in full only to be told 'this is not my area'.

The person managing the complaint is responsible for bringing a resolution and seeing the process through.

Start by listening to the customer attentively and note down the details of the complaint and whether the client has suggested any particular course of action.

Oral complaints

When a complaint is received by telephone or face to face, listen to the client. Take notes on a complaint form while they get the problem off their chest.

Follow this script to ensure each complaint is dealt with in a consistent way:

'Thank you for bringing this to my attention. I'm sorry that this has happened (or that you feel this way), and I will do everything that I can to resolve the problem.'

Request more details, by using phrases such as *'Could you give me a few more details on that'* or *'Could you expand on that point please?'*

Ask how the customer would like the situation resolved. Tell the client what you are going to do to resolve the problem, and ensure that you do whatever you say you will. Then thank the client for bringing the problem to your attention.

Written complaints

When a letter or email of complaint is received, or poor comments are received on a feedback form, contact the client by telephone to discuss.

If this is not possible, ensure a reply is sent same day.

Promises	Do not promise anything you can't deliver – this may make the situation far worse. Simply advise the client you will investigate the complaint and make contact with them once all information has been gathered. Give a time when you will contact them.
Resolution options	When considering options for resolving the complaint consider the following: ▪ Provide an additional service or product to the client that has a high perceived value to them but low actual cost to the business ▪ A future discount to a predetermined value ▪ A credit or gift voucher. This is a last resort option and must be approved by the appropriate manager
Resolution	Complete the complaints form noting the solution to the complaint and ensure the complaint is resolved. Completed forms are handed to the Office/Administration Manager to enter into the customer database and file. Contact the client within 24 hours of the original complaint with a resolution. Seek assurance from the client that the matter is resolved to their satisfaction and confirm the resolution in writing. If the client is still not happy, request a meeting at a time that is convenient to them to resolve the issue.

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Complaint Form

This form is designed to ensure that all complaints are dealt with in a consistent way, and to truly delight a client that is complaining or unhappy.

If you have any doubts as to whether you have delighted the client, please put 'No' to the last question and give an explanation.

Client name: ____________________

Feedback form	☐	Face to	☐
Letter	☐	Email	☐
Telephone call	☐	Web form	☐

Date complaint received: ____________ Time: ____________

Received by: ____________________

Referred to: ____________ Date: ____________

Nature of complaint:
Recommended solutions:
Solutions to be offered:

Solution approved by: ____________ Date: ____________

Solution applied by: ____________ Date: ____________

Has the client been notified of the solution? Yes ☐ No ☐

Was the client delighted with the solution? Yes ☐ No ☐

Give details if No:

____

____

Professional Complaint Handling Checklist

Checklist to ensure customer complaints are handled professionally	✓
1. **Listen** When a customer has a problem, hear them out: ▪ Listen attentively ▪ Don't interrupt ▪ Prompt for further details when you need to	☐
2. **Consider** Put yourself in the customer's shoes: ▪ Try see it from their point of view ▪ Think about the wider impact this may have had on their daily life ▪ The customer is complaining because they want to remain a customer ▪ This is a great opportunity to improve something	☐
3. **Solve** Ask the customer what solution they'd like or offer a solution: ▪ Own the situation and solve the problem for the customer ▪ If you need further authority to act, consult a manager immediately ▪ Don't let the customer walk away unhappy ▪ If the problem involves a third party – be the champion for the customer	☐
4. **Improve** Change internal processes to ensure this doesn't happen again: ▪ If you, or another team member needs training, then request it ▪ Update your operations manual ▪ Discuss with the whole team so everyone knows what happened	☐
5. **Record** Make a note of what happened for future reference: ▪ Add details to the customer database	☐
6. **Report** Make sure the appropriate parties know about the event that brought about the complaint: ▪ Report to management if appropriate ▪ Report to the third party if there's one involved ▪ Let other team members know	☐

Completed by: ____________________ Date: ____________________

Checked by: ____________________ Date: ____________________

Example Query Log

Date	Customer name	Phone	Email	Details of enquiry	Method received	Taken by	Referred to	Referral date	Date actioned	Action taken	Followed up	Added to database
1/10/2011	Mary Example	07 5771234	Mary@bloggs.co.nz	Would like new catalogue of parts emailed	Email	Jake M	John S	2/10/2011	2/10/2011	PDF catalogue emailed to client	9/10/2011	Existing
5/10/2011	Peter Example	06 3569987	Pete@browninc.co.nz	Do we have any black circles?	Phone	Jake M	Sheila P	5/10/2011	5/10/2011	Sold 1 set of black circles	12/10/2011	Yes

Surveys & Market Research Guide

Introduction

Running a survey or conducting market research is a great way to find out what customers and prospective customers want.

By gathering some useable data, you can tailor your products and services to your clients' needs.

It's also a great way to monitor the marketplace and find out how you are perceived.

Contents

This guide contains the following topics:

Market research

Introduction	Market research is a term given to any exercise where you are collecting information from the marketplace. Market research is generally conducted for: ▪ Planning marketing ▪ Business development ▪ Product/idea testing
Surveys	Surveys are a type of quantitative primary research. This is a very common method of conducting market research. Questions can be tailored to discover the necessary information just as the participants can be targeted to a particular demographic. Surveys are quick and easy to set up and the results are generally easy to collate and analyse. The main drawback for a survey is that they generally do not provide in-depth information. Surveys are great for collecting statistical data.
Customer advisory board	Customer advisory boards are qualitative primary research. A customer advisory board is an exercise where a business chooses a selection of customers to participate in a frank discussion about the company. Customer advisory boards involve much planning and organisation, however the outcome is very specific and in-depth business development advice which can be relevant for years to come. These work well for service providers. Your accountant can facilitate a customer advisory board for you.
Focus groups	Focus groups are much the same as customer advisory boards, but are not necessarily made up of existing customers. Focus groups test products and respond to ideas. These work well for product-oriented businesses.
Concept testing	Concept testing is when you test an idea before developing the product or service. Both quantitative and qualitative research methods are often used.
Product testing	Product testing is when a select group of people are given pre-market products or services and rate their experiences. Both quantitative and qualitative research methods are also used in product testing.

Types of survey

Face-to-face survey	This is an old fashioned survey where a person is approached, often on the street, and asked a series of questions. This is most suitable for market research which canvasses clients and non-clients. Questions are generally yes/no or on a scale. Data is then keyed in and analysed back in the office. Pro: Great variety of people involved Con: Much paperwork involved
Phone survey	This is a typical type of market research which can be aimed at the customer database or a wider demographic These are often run by specialist companies and the data is provided in various forms. Pro: Easy to outsource Con: Stigma attached to phone surveys
Email/Online survey	These types of surveys are put together using online software and can be sent out by viral marketing or social networking or emailed directly to a customer database. Results are automatically collated and generally have built-in tools for analysis. Pro: Cheap and easy to use Con: Need email addresses for all customers for targeted surveys

Service providers

Online survey builders	There are plenty of online survey builder tools available at minimal cost. Two tools stand out as the most widely used: ▪ SurveyMonkey — www.surveymonkey.com ▪ Qualtrics — www.qualtrics.com
Market research companies	The Market Research Society of New Zealand has member information on its website www.mrsnz.org.nz. There are many market research companies in New Zealand including: ▪ Colmar Brunton — www.colmarbrunton.co.nz ▪ The Nielson Company — www.nielsen.com ▪ Digipoll — www.digipoll.com Most market research companies can put together a package combining surveys and focus groups.
Your accountant	Your accountant is perfectly placed as an impartial contact to facilitate your customer advisory board.

A lesson from Apple Inc.

On market research	Former Apple Inc. CEO Steve Jobs has famously scorned market research and focus groups: *"It's not about pop culture, and it's not about fooling people, and it's not about convincing people that they want something they don't.* *We figure out what we want. And I think we're pretty good at having the right discipline to think through whether a lot of other people are going to want it, too. That's what we get paid to do. So you can't go out and ask people, you know, what's the next big thing?* *There's a great quote by Henry Ford, right? He said, 'If I'd have asked my customers what they wanted, they would have told me a faster horse.'"* Keep in mind that market research can only go so far, and a truly innovative idea or product may not initially be well received. A true entrepreneur needs to trust their gut.
You are not Steve Jobs	You need to know your customer and your market. Apple Inc. can get away with not doing market research, identifying target markets, or going out and talking with customers because of their industry and their cult following. Your business is not Apple Inc. and you are likely not selling iProducts, therefore you may need to do research to understand your customers. While Steve Jobs says he doesn't do research, it's clear that his team goes out to thoroughly study the behaviours and interests of those they think will buy their products, even if they're just friends and family. Maybe don't ask your customers directly what they want. If you are developing a revolutionary new product, consider doing your own research by going into their environment and ask lots of 'why' questions until you have thoroughly explored the ins and outs of their decision making, needs, wants, and problems. Some simple product or service testing will tell you if you're on the right track.

Customer Advisory Board Guide

Introduction

You can greatly improve your chances of succeeding in today's marketplace if you focus your efforts on addressing the business issues that face your key customers. Consequently, it is more important than ever that you know ‘the voice of your customer’ and that you use this knowledge to create competitive solutions that deliver real business value.

Contents

This guide contains the following topics:

Your Customer Advisory Board Resource Book

Listen to your customers

Imagine one of your customers sitting down at a luncheon with several other business owners. The subject of your business comes up. What will your customer say about you and your company?

Will it be positive? Will it be negative? Or worse yet, will it be nothing at all? Will your customer, instead, be silent, listening carefully to what's being said by others while internally running down a list of comparisons of your company versus the other companies being discussed?

It's a given that customers are thinking about you and the service your company provides. Even if they aren't talking about you to other business owners, they're evaluating your company every time you provide a service. They're also evaluating your company every time you answer the phone, return a call, or send out an invoice or other correspondence.

Ironically, it's often the non-technical aspects of what you do that are noticed most by customers. We know that customers often leave a company not because the company was technically incompetent, but because of the way they were treated.

It comes down to the issue of perceived indifference. You know, the little things that communicate to the customer that they aren't as important to the company as they think they should be.

What are your company's areas of perceived indifference? Your phone procedures? Your invoicing procedures? The way you serve customers? The amount of contact with your customers? The attitude of a team member? Delivery of product?

Whatever your issues of perceived indifference, you owe it to yourself to find out what they are and fix them – ***now!*** Every day you wait, you risk losing a customer who feels unheard or uncared for.

So, how do you determine your issues? We've found the best way to reveal what those issues are is to ask. Here's the really important part, you must really ***listen*** to your customers. They already have the answers and are more than willing to share them.

When you think about it, wouldn't it be better to get your customers talking to you directly about their concerns, frustrations, and desires rather than telling someone else? Of course it is, but the benefits don't just stop there.

Here's the interesting part.

You and your team probably already know much of what your customers' concerns are. It may be that the greatest benefit from the feedback you get at the CAB will help you set your re-engineering priorities.

Based on the intensity level of your customer feedback, you'll know which issues need to be addressed and in what order.

Beyond that, your team will be motivated more than ever before by the feedback. You see, for the first time, you and your team will be held accountable to a whole new level of customer expectation.

This is a day like no other in your business. For many companies it's truly a turning point and the beginning of great things.

How many customers?	The number of customers that attend these meetings should be between 8 and 12 people. It's critically important that you keep the numbers small enough to ensure that the group is manageable. It's also important that each person has the chance to participate. For group dynamics, the best number is around 10 people.
How long should it run?	It really depends on the overall objective. Your meeting should run for around 2.5 hours. The length really depends on how much feedback you need and the group dynamics.
Time allocation	The amount of time you need to allocate for the meeting is quite straightforward. You need to be there to introduce your facilitator. Then you can leave. When the meeting is over, you need to come back in the room (your facilitator will normally give you a time and/or locate you at this time) and thank your customers with a quick 'thank you' speech. At this point, your customers typically want some refreshments and then they leave. After your customers leave, it's important to have all the business owners allocate time with the facilitator to discuss what your customers have said and what you need to do about it. This follow-up session usually takes one hour. **Please note:** We have found that providing you with a complete recording of the meeting combined with a follow-up session is the most effective way to convey the content of the CAB.
The venue	The room setup has to be open and one where people can communicate easily. A boardroom style works best because everyone is facing each other. Place jugs of iced water, glasses, and bowls of mints (or something fun) on the table. Remember, it's a nurturing exercise. Your customers should also be issued name badges or place cards printed in a large font so that everyone can see the names clearly. Once you've thanked your customers for giving their time and you've introduced your facilitator, the best thing you can do is leave! Now that will be very hard. But if you want the best results, it's important that your customers see your facilitator as a neutral party. Without you in the room, you'll find your customers will be much more open and more prepared to offer their opinion without feeling intimidated. By removing yourself from the meeting you'll also save yourself the trauma of taking simple comments on your business as personal attacks, which they never really are anyway. And, of course, remember that the entire meeting is being taped, so you won't miss out on anything.

Recording your CAB	Obviously taping your CAB is extremely important because the information that comes out of the meeting will be truly valuable. Make sure you have sufficient tapes for 3 hours and that the equipment is set up and tested before the meeting starts. In addition to recording the event, your facilitator will be making good, clear notes during the meeting so that the consultation with you afterwards is more meaningful.
Time of day	The time of day is not as important as matching it to the scheduling needs of your clients. Some companies have found a breakfast meeting easiest. Others have found that an extended lunch or late afternoon works best. There are no hard-and-fast rules. You need to be sensitive to commuter issues and the geographic location of the participants involved.

Speaking of logistics, what will you need to do?

Before the meeting

- Invite customers by mail or fax 2–3 weeks before the meeting
- Confirm with customers 2–5 days before meeting
- Book the venue (or use your meeting room) and confirm the number of people attending
- Give your facilitator a list of the customers who are attending, along with a brief profile
- The following equipment and amenities need to be organised with the venue:
  - Boardroom table suitable for the number of customers attending
  - Audio recording equipment suitable for taping the meeting. The better the quality of the equipment, the better the recording
  - Enough audiotapes to last 3 hours
  - Water and mints on the table
  - Pens/pencils and writing paper
  - Refreshments

    On arrival – Coffee, tea, iced water, orange juice

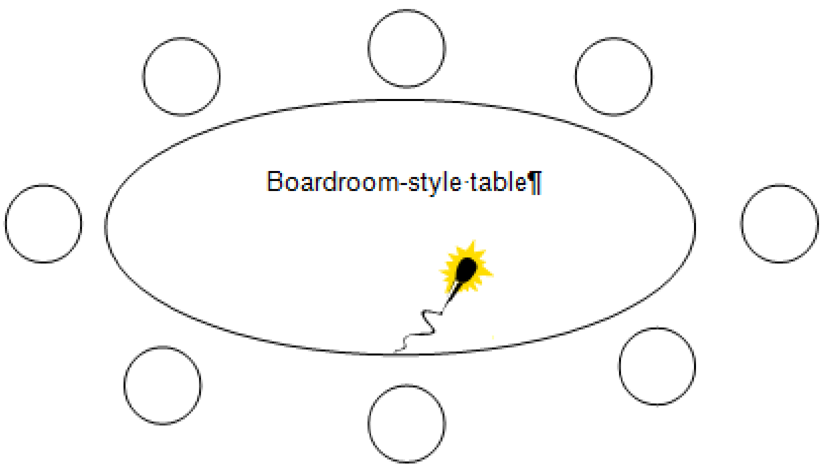
    On departure – Coffee, tea, iced water, orange juice

    Either breakfast, morning refreshments, lunch, afternoon refreshments, or an evening supper
- Communicate to the facilitator any additional questions you'd like asked
- Provide name badges with customers' names in a large font

After the meeting

- Send thank you letters and a small gift of appreciation the next day
- Prepare a report to communicate your follow-up action steps to participants
- Implement the ideas!

Room setup



Invitations

Who should you invite?	For your first CAB, it's not a good idea to invite unhappy customers. Their negativity can often affect the group very quickly. In this situation, you'll often find yourself in one of two scenarios: negativity spreads across the group, or the rest of the group runs defence for you and the meeting turns into a free-for-all. To avoid either situation, the solution is to invite a cross-section of customers who are relatively happy. Some may have been customers for years, some may be new customers, some may be large customers, others smaller, etc. Make sure that you try to cover your major target groups. For example, if you want feedback from a certain segment of your customers, then address them specifically.
How do you invite people?	You need to talk in terms of benefits with your clients. The question – 'What's in it for me?' – needs to be addressed. Without this, your busy customers may not want to give up their time. They also need to feel sure that the CAB will be valuable and that their time is well appreciated. For that to happen, they have to believe that you're really going to listen to their feedback and ***do something about it.*** You need to let them know that you really need and want their help and that, in return, you'll make a commitment to implement and test their suggestions, so that you can make it easier for them to do business with you. Obviously, one of the best ways to invite your customers is to write to them and explain exactly why you're holding a CAB. Refer to 'Sample Invitation Letter' on page 42.

Sample invitation letter

Dear [Salutation]

We want to ask you for your advice.

We value your business experience and the day-to-day problems you face. By inviting you to share your experience with us, we know we can guarantee to serve you better in the future.

You may have noticed that we've been making some changes over the last few months. Over the next few months, we plan to make some more changes to improve every aspect of our business for you.

[Salutation], we're writing to invite you to join in a Customer Advisory Board that will allow us to find out the things that are important to you. It means we'll be able to find out what you really need.

This Customer Advisory Board will offer you a chance to tell us what we have to do to become the [Service] you want to deal with. You'll have an opportunity to get things off your chest and give us the feedback we need so we really can give you the service you deserve.

So, here are the details…

This special event will be held at the [Venue Name & Address], on [Day Date]. It will start at [Time am/pm] and end at approximately [Time am/pm].

We've only invited a small, select group of clients, so we'll be giving you a call in a few days to find out if you're able to attend. That way we can arrange for [dinner and] refreshments at the venue.

There are two important things you should know.

First, we've asked facilitator [Facilitator Name], who is a Chartered Accountant, to run the meeting for us. [Facilitator Name] will ensure that the meeting is impartial and objective and he/she will take in all your feedback, good and bad.

And second, we want you to know we have a very real commitment to improving our services. To make sure we do that, we'll be audiotaping the meeting. That way we can review the meeting and make sure we implement your suggestions. Of course, you'll benefit by our doing that.

We look forward to talking with you soon and getting some good advice.

All the best,

[Director Name]

What should you do at the CAB?

General	Once you've thanked your customers for dedicating their time and you've introduced your facilitator, the best thing you can do is leave! That will be very difficult, we know, but if you want the best results, it's important that your customers see the facilitator as a neutral party. Without you in the room, you'll find your customers will be much more open and ready to offer their opinions without feeling intimidated.
To introduce the facilitator	To assist you with your introduction, we've put together a simple script (see page 44) that you can use to get an idea of the type of information you'll need to cover. Feel free to add to it as you see fit.

Sample introduction for the start of your meeting

"First of all, I'd like to thank you for investing your time to help us help you better.

And second, I'd just like to explain the format for this meeting.

You see, the reason for this meeting is to find out exactly what you like and what you don't like about dealing with us. Also, we're looking to find out what other services we need to be providing for you.

So this meeting is to make sure that we do it properly. We've asked [Facilitator Name] to join us to help gather your thoughts. Now, it's best that I explain their *role in this process.*

[Name] is a Chartered Accountant who is [Background]. [Name] is here to make sure that the meeting runs smoothly by directing the flow of the conversation and asking pertinent questions. It's important to mention that [Name] has no connection to the business. [He/she] is simply here as a neutral party.

You'll notice that neither [Director] nor I will be in the room. And there's a reason for that. We both believe you may feel inhibited if we're present. So by us leaving, you can feel free to say whatever's on your mind, without feeling obliged to justify yourself.

The whole session will be taped so that we can work through your suggestions and make sure that they're shared with the entire team.

You'll understand that there may be some ideas that for some reason can't be put into practice straightaway. Whatever your feedback or ideas, we'll be in touch in the next few weeks to let you know how we'll act upon these.

So thank you once again. [Director] and I will see you after the session."

Sample script and questions for your facilitator

Opening	▪ Thank you for coming ▪ Who I am, what our relationship is ▪ My role is to ask questions and to listen ▪ Recording equipment… how to get me to stop the tape ▪ Limited amount of time, try to be concise, please don't talk while someone else is speaking
Purpose	▪ [Company Name] really wants to know how to serve you better. ▪ Why you're here – explore how you feel about the past and design the future. To do that, let's begin by asking you a couple of quick questions: ▪ How long have you been a customer? ▪ What made you choose – how did you choose – this business in the first place?
Reviewing the past	▪ Has anyone ever used another business of this type? ▪ Why did you leave that business? ▪ What would have to happen for you to leave this business as a customer? ▪ Did that business do something or provide a service you think this company should replicate?
Services	▪ What services or products of this company do you use and how frequently? ▪ How would you rate the timeliness of the services you receive? ▪ Are you sure you know all the services this company provides? ▪ How do you feel knowing that they provide services other than those you knew about? For example, are you excited to learn about them, discouraged that they didn't mention them before? ▪ What is your perception of their ability to deliver some of the services you weren't aware of? Do you think that the company is competent/capable to do these other things? ▪ What are 1 or 2 services that would make your life easier, more profitable, etc.? Are there any additional services that you expect, but aren't receiving? ▪ What image do you think the company has? ▪ Do you feel name recognition is important? Would you like the company to be more visible in your community?
Competition	▪ What is your perception of the competition? ▪ How often have you been solicited by other businesses of this type and in what ways?
Customer service	▪ With regard to overall service, how does this company compare with other businesses that you may have dealt with? ▪ How important do you feel to the company when dealing with them? ▪ How is your contact with the company handled (one person or a team)?

	▪ How is the team; do you perceive them as knowledgeable? ▪ Do you feel dependent on one person, or can many people help you? ▪ How is the phone system? The receptionist? When you leave messages, does their contact respond in time? (Are you confident your messages are forwarded?) ▪ Is material delivered when promised? ▪ As a side question, how do you feel about dress code? How would you feel if the company began wearing more casual clothing? ▪ How about the location of the company… is it convenient and comfortable?
Invoicing	▪ How is the company's billing system? Does it provide you with enough information? ▪ How is the timing of the invoicing and information?
Communication and proactivity	▪ Does the company communicate clearly what they need of you, what they're doing, and how they could improve their communication? ▪ Does the company communicate by email? Would you like them to?
Overall	▪ What are the top 2 things you like about the company? What are the 2 things you dislike most about the company? ▪ Where would you rate the company on a scale of 1 to 10? Where would you rate the person you deal with on a scale of 1 to 10? What can they do to move closer to a 10? ▪ How frequently do you refer new business to the company? ▪ Does the company appreciate this? ▪ What was your referee's feedback?
Overview and wrap-up	▪ How valuable was this session? ▪ Thank you for your time. We'll compile feedback, and they'll get back to you. ▪ If we were to ask you to come back and do this again in a year or so, would you be willing to help again?

Follow-up

Personal letter

The first thing you need to do is to make sure you send a personal letter to thank the customers for their time and their contribution to the session.

To help you out, you'll find a sample letter on page 48 that you can use.

Send a gift

Remember the saying, 'It's the little things that make the profound differences'. So perhaps you might like to send a small gift.

People always appreciate being thanked and pleasantly surprised. Some examples of gifts are:

- A quality pen engraved with the customer's name
- Dinner vouchers at a first-class restaurant
- Gift hampers full of edible goodies
- Tickets to a popular sporting event
- Flowers and chocolates

If you're going to give a gift, it should be something that reflects your image and your feelings towards what your customers have contributed. Also make sure the gift is sent very quickly after the meeting finishes – preferably the next day.

Another nice idea is to present small plaques or trophies to the attendees. That way, the customers have something they can put up on their business wall that reminds them of the event.

Action report

Most importantly, you need to make sure you follow up with action.

That first action is to send a written report to your customers that outlines essentially four things. They are:

- A list of the issues that were raised
- A list of actions associated with each issue
- A champion who is responsible for following through on each issue
- A deadline date when the issue will be dealt with

That means your report might look something like this…

Issue	Action	Champion	Deadline

Of course, you'll need to listen to the audiotapes thoroughly. Make sure you listen to both the meeting and the follow-up consultation.

Make sure you write this report as quickly as possible and send a copy to all participants. It might be a good idea to distribute a copy to your team members as well.

After the report

Implement some of the simple, workable suggestions straightaway. It's a great way to show customers that you're committed to change. And then work through the rest.

Thank you letter after the Customer Advisory Board

Dear [Salutation]

Thank you for giving up your time to contribute to our Customer Advisory Board.

I hope you enjoyed the experience and that you didn't leave thinking it had been a pointless exercise.

It will be around one or two weeks before I fully review the detailed points and issues that were discussed at the CAB.

Shortly afterwards, I'll send you a report outlining the key issues and what we're going to do about them.

So if you don't hear from us for a couple of weeks, don't assume we're doing nothing.

We're very committed to this process we've started.

If there is anything else you think of that you'd like to talk about with us before we get back to you, please call.

Once again, thank you for your valuable contribution.

Enclosed is a small token of our appreciation.

Talk soon.

Kind Regards

[Client Manager]

Market Research Survey Planning Guide

Introduction

For a market research survey to be truly effective you will need to plan exactly what information you need and how you're going to get it.

Contents

This guide contains the following topics:

Planning your questions

Built-in features	If you are using online survey software, these programmes will often come with suggested questions depending on subject area. These questions may be a great starting point. For example, the Customer Satisfaction questions on SurveyMonkey include: ▪ How convenient is our company to use? ▪ How professional is our company? ▪ Compared to our competitors, is our product quality better, worse, or about the same? ▪ Compared to our competitors, are our prices more reasonable, less reasonable, or about the same? ▪ How responsive is our company? ▪ How well do the customer service representatives at our company answer your questions? ▪ Overall, are you satisfied with the employees at our company, neither satisfied nor dissatisfied with them, or dissatisfied with them? ▪ Do you like our company, neither like nor dislike it, or dislike it? ▪ How likely are you to recommend our company to people you know?
Objectives	Start out by writing down the objectives of your survey. This will provide a platform from which to develop your questions. For example: ▪ I want to know how my service is regarded ▪ I want to know how the product is performing, and ▪ I want to gather new ideas from customers

Writing your questions

Keep it simple	Your questions need to be easily understood and worded simply. Put yourself in the position of the least educated respondent. You will get the best results if your questions are: ▪ Clear ▪ Direct ▪ Brief
Eliminate ambiguity	Ensure that your questions can only have one meaning.
Think about wording	Ask sensitive questions in different ways. For example some people may have reservations disclosing their age. Instead you could ask: ▪ What age range do you fall into?
Question intent	Keep these things in mind when developing your questions: ▪ Will respondents be able to understand the question? ▪ Will respondents be able to answer the question? Ask questions that read well and are quick and easy to answer. If questions are too long or complex, the respondent may write the answer without really reading the questions and you will end up with irrelevant information. Make sure that all questions asked are relevant to all respondents and the survey's purpose. In addition, avoid hypothetical questions. If questions require too much thinking to answer, respondents may just click the same option each time to finish the survey faster.
Constructing good questions	There are four key principles in developing good questions: ▪ Be brief ▪ Be objective ▪ Be simple ▪ Be specific Try avoiding biased or loaded questions for example 'We recently launched our fabulous new Product X, what do you think?' Instead try 'What do you think of the new Product X?' Stay away from absolutes e.g. 'never', 'always', and avoid words with a negative overtone like 'only' or 'just'.

Choosing question types

Open-ended/ essay

These types of questions are great for getting an answer in the respondents' own words and picking up attitudes and feelings, but watch out for people just putting 'I don't know' or skipping the question.

Open-ended questions can also be harder to analyse.

Closed-ended

Multiple choice or yes/no questions are very straightforward and easy to answer and analyse.

Programmes like SurveyMonkey also have the ability to add skip logic, meaning that if the answer to a question is 'yes' it leads on to another question, but if the answer is 'no', it skips on to a different one.

This means you have the ability to skip irrelevant questions.

For multiple choice questions, these work best if you make the choices mutually exclusive (or unable to all be true at the same time).

Ranked questions

This is where the respondent ranks a list of qualities for example from 'most important' to 'least important', with each ranking only used once.

For example: Importance of Individual Fruits

	Not important	Important	Very Important	Extremely Important
Apples	❍			
Oranges			❍	
Pears				❍
Pineapples		❍		

Matrix/rating scale

This is where the respondent is given a statement and asked to rate it e.g. 'strongly disagree' to 'strongly agree'.

If you set up the rating scale in your survey in this format, make sure that the rest of the survey is consistent and all rating scales go from the low to the high frequency throughout (or vice versa).

In addition, some surveys may only label the outliers or endpoints of the scale, but it is good practice to assign a label or number to each rating scale.

A rating scale is a great way to collect subjective information.

If you wish to have a neutral midpoint, use 5 or 7 options e.g.

Strongly Disagree	Disagree	Neutral	Agree	Disagree
❍	❍	❍	❍	❍

If you want the respondent to make a decision either way, use an even number of options and remove the neutral ground e.g.

Not important	Important	Very Important	Extremely Important
❍	❍	❍	❍

Also think about adding a 'Non Applicable' or N/A option. This will give the respondents the ability to opt out and will increase the relevancy and accuracy of the data collected.

Question sequence

Opening questions	Your opening questions should be simple, short and interesting. This will help the respondent build confidence and familiarity with the survey before asking them hard or complicated questions.
Grouping questions	If you have more than one main topic or areas, ask all the questions about one area before moving on to the next. Arranging your questions on pages is a good way to naturally divide different topics.
Demographics	Sensitive questions around demographics e.g. age, income etc, may be best left to later in the survey. If you ask these questions too early, your respondents may abandon the survey.

Collection & communication

Introduction	How you send out your survey and collect the data is important to the results you will receive. First decide if you are sending it out to an existing customer database or opening it up to the general public.
Existing database	If you are using an existing database with email addresses, you may wish to let the programme, such as SurveyMonkey, manage the process for you. You can upload a file of contacts and send both the survey and the invitation together. The benefits of this approach are that you can easily send reminder/follow up email to the customers who have not yet responded, and you can see who has responded without asking them for their details, as the link is unique to each respondent. Alternatively a programme like SurveyMonkey will give you a generic link which you can send to everyone on your database.
Website	You can also post a link to your survey on your website, so that anyone who comes across it fills it out. Some companies do this for months at a time. This approach works well for e-commerce, where after the purchase, the customer is redirected to a survey. Sometimes the customer is sent a follow-up email a week after the order is placed, which contains a link to a feedback survey. You can also embed the survey pages into your web pages.
Social media	You could also paste a link to your survey on your Facebook wall. Additionally, SurveyMonkey contains the ability to embed surveys into Facebook using a special Facebook App.
Phone	Programmes like SurveyMonkey also let you enter data manually, which means you can answer on behalf of the customer, if you need to take the survey over the phone. The benefit of this is that the data is still collected and analysed along with data from email and web respondents.
Incentives	An incentive will go a long way to ensuring your survey is answered. For existing customers, consider offering one great prize. For example, a new gadget, an experience or holiday or a shopping spree. For a wide reaching survey such as a web survey open to anyone, consider offering a small gift to anyone who contributes. For example a gift or discount voucher for your product or service.
Collecting data	Ensure that you collect as much general information for the respondents as you can – this will allow you to make your database more robust.

Analysing survey data

At a glance	Many survey programmes will show you at a glace what the survey results are, at any point during the process. SurveyMonkey has automatic graphs which can be downloaded. These are an excellent way to see the response very quickly. You can also filter quickly by responses e.g. demographics.
Complete information	You can also download full responses in a spreadsheet and analyse results using Excel tools or additional online software.

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