



# CUSTOMER SATISFACTION DATA

Collecting, Analyzing and  
Reporting

With information from: *Surveying Clients About Outcomes* - The Urban Institute, 2003

# CSBG ORGANIZATIONAL STANDARD 1.3 :

The organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board

# 1.3 INTERPRETATION: SYSTEMATIC APPROACH

Collection of data across programs - how many programs collect customer satisfaction data? At what points are data collected (intake, after services are delivered, and after outcomes are achieved)?

Methods of collection - surveys, focus groups,  
Structure that supports data analysis - quality improvement committee or staff person

Tools for data collection and analysis - scorecards, dashboards

Process for reporting - clear procedure for reporting and analysis from committee to leadership team to board



# CHECK LIST

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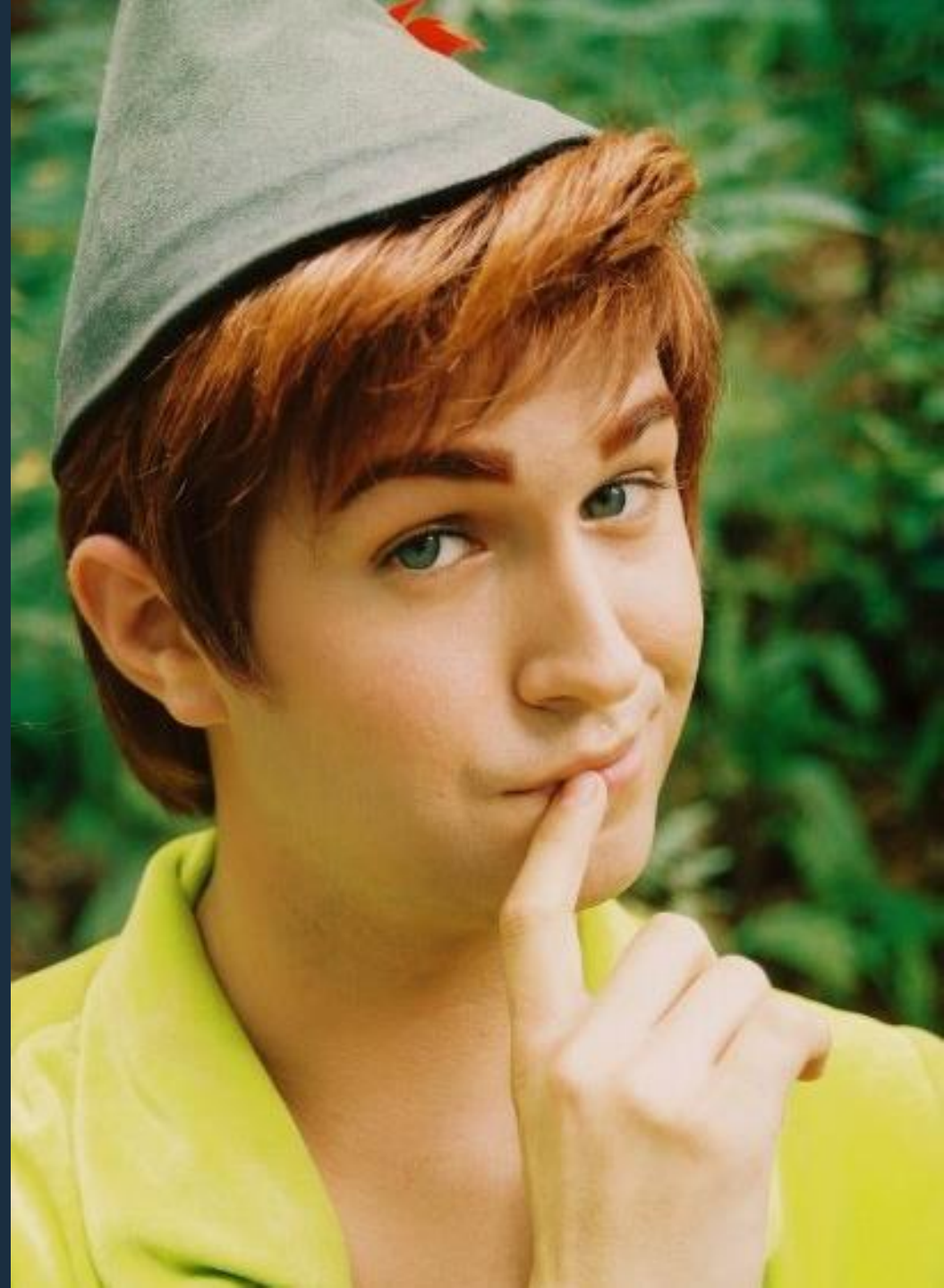
# IT CAN BE RELATIVELY EASY TO MEET THE MINIMUM REQUIRED BY THE STANDARD:

Conduct a survey once every three years that simply asks your clients to rate their 'satisfaction' with the agency on a scale of 1-5.

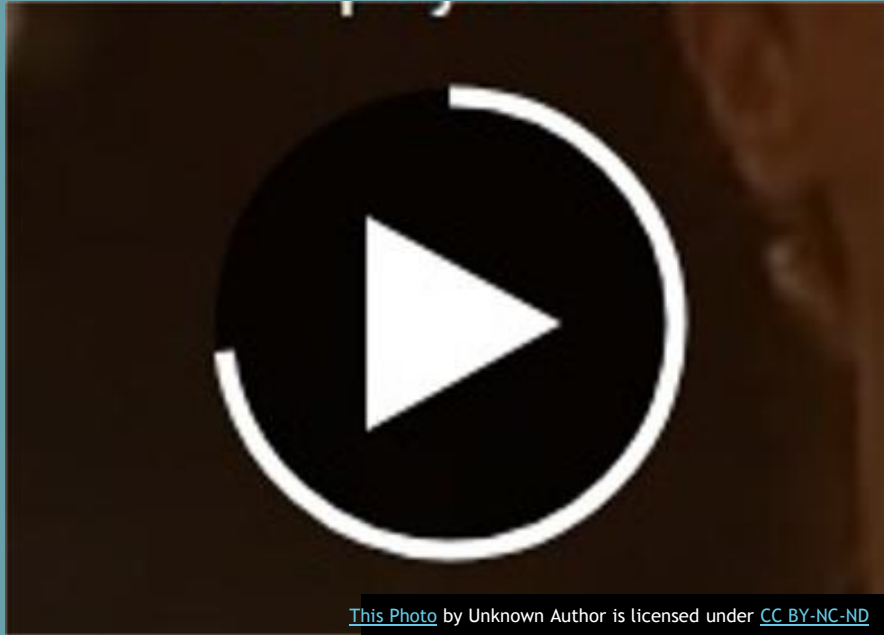
Report to the board the average score that the agency received, and note whether this is a better score than last time or not.

Include the agency 'score' in your community assessment.

BUT WHAT  
DOES 'THE  
MINIMUM' GET  
YOU?



LET'S START  
AT THE  
VERY  
BEGINNING



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# WHY IS CUSTOMER SATISFACTION IMPORTANT?

Directly affects the ability of customers to access and use services

Critically important to the continuous improvement of services  
(ROMA cycle)

Data is key component of the needs assessment & strategic  
planning processes

Customer focus empowers the individuals and families served by  
the agency

Required by the Organizational Standards (1.3, 6.4)



# WHAT IS CUSTOMER SATISFACTION?

Highly personal assessment strongly affected by customer expectations

Influenced by (1) contact with the service provider, and (2) personal outcomes

Research shows is based on confirmation or disconfirmation of customer expectations

Related to ability of customers to hold organization accountable

Three customer needs: security, esteem, and justice

# THREE ELEMENTS OF CUSTOMER SATISFACTION

Experience of customer-worker interaction

Satisfaction with service provided

Satisfaction with outcome

IF YOU ARE GOING TO GATHER  
CUSTOMER SATISFACTION DATA,  
WHY NOT GET THE MOST VALUE  
OUT OF YOUR EFFORTS?

**Who are your customers?**

**What do your customers value?**

**What do you want and need to know?**

# SERVICE QUALITY FACTORS

Timeliness and convenience

Personal attention

Reliability and dependability

Employee competence and professionalism

# SERVICE QUALITY FACTORS

Responsiveness

Tangibles such as physical facilities, equipment, and appearance of personnel

Availability

# CUSTOMER SERVICE - FIVE GENERAL OPERATING PRINCIPLES

- (1) Successful customer service organizations listen to, understand, and respond - often in unique and creative ways - to the evolving needs and constantly shifting expectations of their customers
- (2) These organizations establish a **clear vision of what superior service is**, communicate that vision to employees at every level, and ensure that service quality is personally and positively important to everyone in the organization

# CUSTOMER SERVICE - FIVE GENERAL OPERATING PRINCIPLES

- 3) They establish concrete standards of service quality and regularly measure themselves against those standards.
- (4) They carefully hire people, train them extensively so they have the knowledge and skills to achieve the service standards, and then empower them to work on behalf of customers, whether inside or outside the organization

# CUSTOMER SERVICE - FIVE GENERAL OPERATING PRINCIPLES

(5) They recognize and reward service accomplishments, sometimes individually, sometimes as a group effort, in particular celebrating the successes of employees who go one step beyond the expected actions for their customers



# WHAT MAKES A CUSTOMER-FOCUSED ORGANIZATION?

1. Customer-focused vision and mission statements
2. Customer-oriented organizational culture
3. Attention to the total customer experience
4. Customer service standards and accountability

# CUSTOMER FOCUSED VISION AND MISSION STATEMENTS

Focuses and guides employee actions (core values)

Sets and manages customer expectations (performance  
management system)

Contributes to instilling a culture of customer orientation  
(provides all employees the necessary information to  
effectively design, manage, and improve their processes)

# CUSTOMER ORIENTED ORGANIZATIONAL CULTURE

Often entails “a massive cultural shift away from what is convenient for the organization to what is needed by the service users”

Requires multiple methods and strategies

Needs assessment and strategic planning should highlight customer feedback

# ATTENTION TO THE TOTAL CUSTOMER EXPERIENCE

Conduct a “customer walkthrough” exercise

Attention to detail--Personal notes in database

Physical factors--Emphasize comfort and convenience

Organize procedures around customers (convenient,  
streamlined, timely, and prepared)

# CUSTOMER SERVICE STANDARDS AND ACCOUNTABILITY

Behavioral change requires standards,  
not suggestions

Develop customer service standards

# FOCUS ON FRONTLINE STAFF

Golden Rule: Treat employees well

Emphasize customer satisfaction in the hiring process

Incorporate customer satisfaction in the orientation process and provide training (instill the organizational culture)

Remove barriers to customer satisfaction

Involve employees in planning and improvement

Recognize and reward employee performance



# WHO ARE OUR CUSTOMERS?

Family

Agency

Community





# WHO TO SURVEY?

Customers - defined as:???

Current Customers

Former Customers?

Community Partners?

The Board?

Staff?

Volunteers?

Others?

# HOW TO SURVEY??

In person interviews



Phone interviews

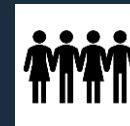


Self-administered by mail

Hard copy handout of questions



On-line survey (survey monkey?)



Focus group

# WHAT DOES YOUR CUSTOMER VALUE?

Many organizations are very clear about the value they would like to deliver, but they often do not understand the value of what they deliver from the customer's point of view.

Phillip Kotler, Northwestern University

# CUSTOMER SATISFACTION DATA CAN TELL YOU...

Are your programs/services making a difference?

What other services are needed?

What do you need to change/improve to be more effective in  
pursuit of your mission?

What impact has a service or services had on customers' lives?

How are customers treated by your staff?

What ideas do customers have for improving service quality?

# What is a Systematic Approach?



# JUST WHAT IS 'A SYSTEMATIC APPROACH' FOR COLLECTING, ANALYZING, AND REPORTING?

Needs to be in writing

Something you can repeatedly (or on an ongoing basis) conduct without breaking the bank

Gathers information that can be compared from one time frame to another

Provides information (data) that you can share with the board and use to make decisions and take action to make positive changes



COLLECTING  
DATA

# METHODS FOR MEASURING CUSTOMER SATISFACTION



Comment cards (in-person, online)

1-800 numbers

Surveys (in-person, online, mail)

Complaint monitoring and resolution

Focus groups



# METHODS FOR MEASURING CUSTOMER SATISFACTION

1-1 interviews

Community meetings

Quality improvement committees

Testers and “Secret Customers”

# THE QUESTIONS

??????

# DEVELOPING YOUR QUESTIONS

Make sure you are asking only one question at a time

Written at a literacy level consistent with your customers'

Eliminate negatively worded questions

Don't ask leading or biased questions

Be time-specific and recent

# DEVELOPING YOUR QUESTIONS

Use complete sentences when asking questions

Make sure questions are consistent from one time period to another so that results can be compared

Phrase questions so that respondents have accurate, ready made answers

Include a 'don't know' or 'N/A' option in your questions

# CUSTOMER SATISFACTION AREAS/TOPICS TO EXPLORE

Welcomed when arrived

Clean

Timely assistance provided

Respectful treatment

Needs met

# CUSTOMER SATISFACTION AREAS/TOPICS TO EXPLORE

Information on other agency services

Recommend the agency to others

Willing to provide additional feedback

Comments - how can we improve  
Service area

# GUIDELINES FOR QUESTION RESPONSE CATEGORIES



# GUIDELINES FOR QUESTION RESPONSE CATEGORIES

Ask questions that provide actionable feedback

Use a scale over Yes/No options

Ask limited open-ended questions “What is the one thing we can do to improve our service...”



# GUIDELINES FOR QUESTION RESPONSE CATEGORIES

Link methods to provide in-depth feedback (focus group follow-up based on survey responses)

Take the surveys to the customers - ease, convenience, and incentives are key to response rate

# GUIDELINES FOR QUESTION RESPONSE CATEGORIES

Don't overlap ranges

How many children do you have? 1-2, 2-4, 4-6, 6 or more

Make sure to cover all options

Strongly agree	Agree	Disagree	Strongly disagree	Doesn't apply to me, or don't know
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Use broad ranges for things like income to make it easier for respondents

Under \$10,000	\$10,001 - \$15,000	\$15,001 - \$20,000	\$20,001 - \$25,000
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# GUIDELINES FOR ORDER OF QUESTIONS

Put most interesting/important to customer questions first

Consider questioning sequencing logic - do questions flow from one to another?

Go from specific to general

Provide options for suggestions/recommendations

Put easy to answer questions last

# GUIDELINES FOR QUESTIONNAIRE CONSTRUCTION

If sent by mail, include a letter from ED and/or board chair

Have an introduction that explains the survey

Make the letter and survey appealing, simple, easy to follow

Include an 'any other comments you'd like to make?'

Conclude with a friendly thank you !

# GUIDELINES FOR SURVEY IMPLEMENTATION

When do customers receive the initial survey?

What is your target response rate?

What training do you provide front line staff?

What form is the survey in?

- Comment card
- Formal paper survey
- E-survey (e.g. on an iPad)

# CONDUCT A PRE-TEST (OR TWO!)

Have several people fill out the survey and provide you with feedback  
- whether on-line or hard copy

If in-person or phone interview - interview several people to see if all questions are clear, etc.

Make any changes and then perform a pre-test (or two!) again

# IN-APP SURVEYS

It's one of the methods with the highest response rates, thanks to the fact that the customer is asked for her opinion while she's engaged with your agency.

In-app surveys are especially handy to measure some of the standard customer satisfaction metrics

# E-MAIL SURVEYS

In-App survey methods aren't suitable for in-depth insights about your customer happiness. Why are they happy or unhappy?

Email surveys, on the other hand, are a good tool for this.



# HOW TO IMPROVE RESPONSE RATES?

Sending advanced post card or letter - include logo, etc.

Include a letter from the Exec. Dir. with the survey

Send a reminder phone call or card

Include SASE if mailing

Make questionnaire easy to complete

Provide incentives

Use multiple modes

Ask staff to encourage folks to participate



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# ENSURE CLIENT CONFIDENTIALITY

Inform customers that their responses are voluntary and that they can refuse to participate without any impact on services, etc.

Make sure that you can make responses anonymous and confidential and inform respondents that you are doing so

If surveying youth, make sure to get parent/guardian permission

# ANALYZING DATA



# COLLECTING AND USING THE DATA

Using Survey Monkey allows you to easily analyze survey results

Hard copy surveys can be manually entered into survey monkey, as can written results of in-person or phone interviews

For open-ended questions, you need to code the data and/or use the survey monkey 'word cloud' feature

**Q30 Please add any additional comments  
you would like to make about your  
experience dealing with  
Community Action Program.**

Answered: 98 Skipped: 299

Excellent Wish Services Happy  
Thankful for the Help Position Caring  
Additional Friendly Application Program  
Email Address Nice Rude Staff  
Treated with Respect Assistance Appointment  
Received Live Experience Embarrassed  
Pleasant Situation Able Woman CAP Questions

# WAYS TO ANALYZE THE DATA

Comparison across client sub-groups - demographics, program participation, number of services received, case manager, location, etc.

Comparison across targets - where are we meeting (or failing to meet) established goals.

Comparison with previous surveys - trend analysis.

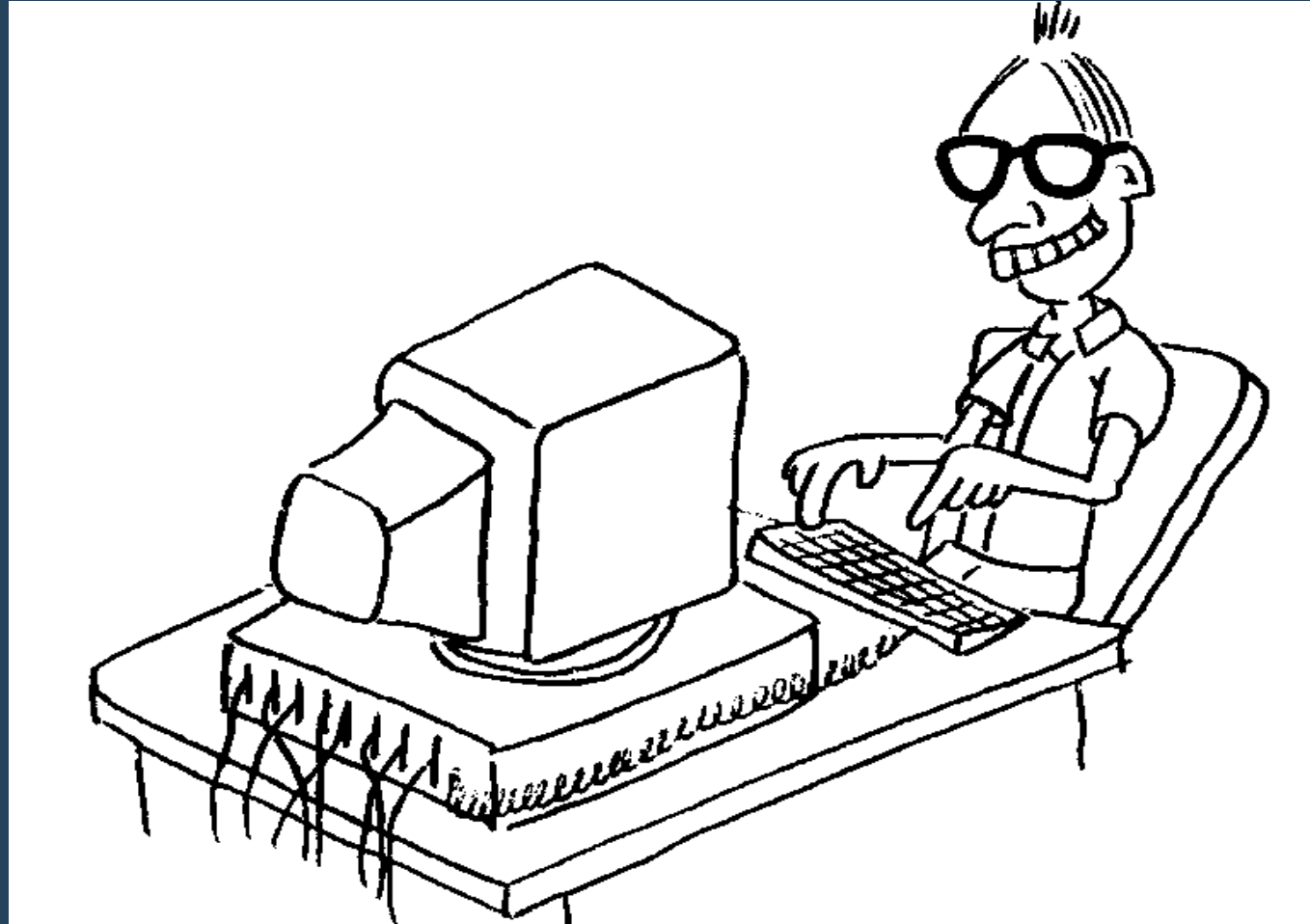
# WAYS TO ANALYZE THE DATA

What were the trends the data identified?

Were there differences in responses from different segments of your customer population?

Did the customers offer any suggestions for improvement?

# Let's Get Customer Service Geeky...





# CUSTOMER SATISFACTION SCORE

This is the most standard customer satisfaction metric, asking your customer to rate satisfaction with your agency or service.

Your CSAT score is then the average rating of your customer responses.

The scale typically ranges between 1 - 3, 1 - 5, or 1 - 10. A larger range is not always better, due to cultural differences in how people rate their satisfaction.

# CUSTOMER SATISFACTION SCALE

	Customer Satisfaction Score (CSAT)
<b>Question</b>	<i>How would you rate your experience with your ... (e.g. recent support requirement)?</i>
<b>Scale</b>	Very unsatisfied / unsatisfied / Neutral / Satisfied / Very satisfied

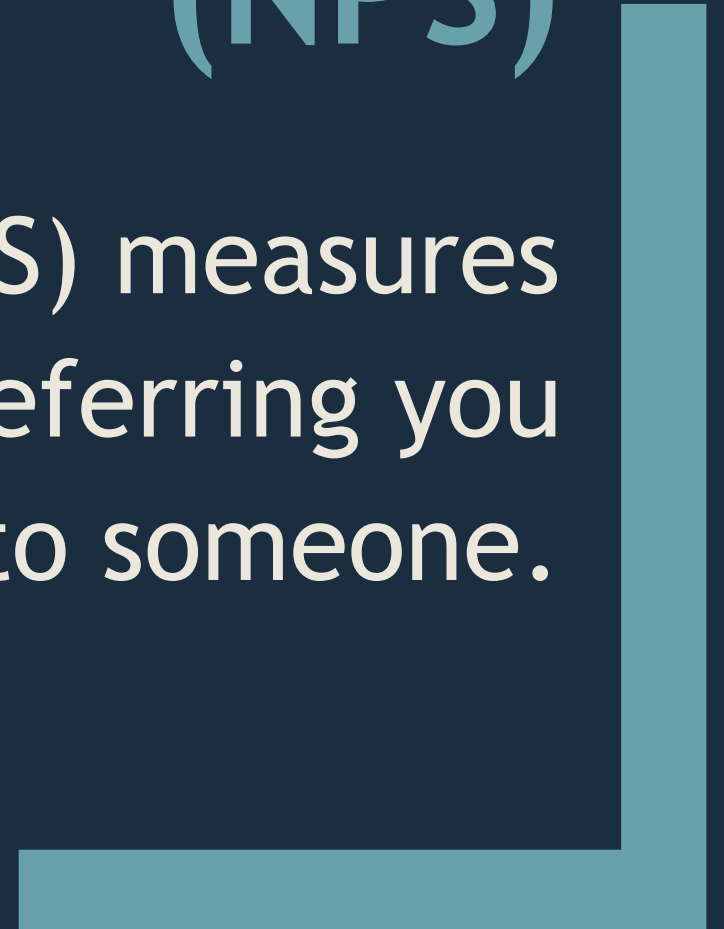
# CUSTOMER SATISFACTION

The benefit of the CSAT metric comes from its  
directness.

The downside, however, is that satisfaction is hard  
to estimate, even for the customer.

# NET PROMOTER SCORE (NPS)

The Net Promoter Score (NPS) measures the likelihood of a customer referring you to someone.



# NET PROMOTER SCORE

HOW LIKELY ARE YOU TO RECOMMEND US?

Not a chance

**0**

**1**

**2**

**3**

**4**

**5**

**6**

**7**

**8**

**9**

**10**

Very likely



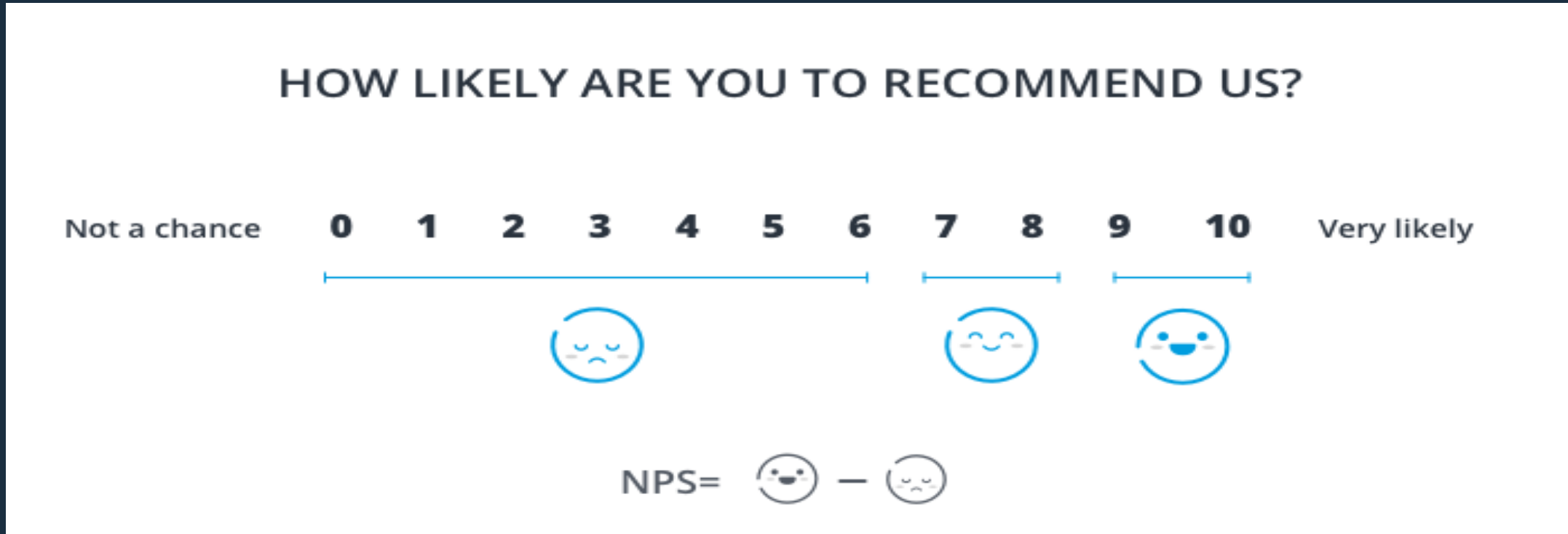
$$\text{NPS} = \text{Promoter} - \text{Detractor}$$

# NET PROMOTER SCORE

The strength from this metric is that its question isn't about an emotion ("How satisfied am I?"), but about an intention ("How likely am I to refer?"), which is easier to answer.

It cuts down to the question of whether the service is good enough to refer it and put your own reputation on the line.

# CALCULATING YOUR NET PROMOTER SCORE



Calculating your NPS score is quite easy. Take the percentage of respondents who fall within the 'promoter' category (10 - 9) and subtract the percentage of 'detractors' (0 - 6).

# CUSTOMER EFFORT SCORE (CES)

With this method, customers rate the effort it took them to have their issue solved – generally on a scale from 1 (very low effort) to 7 (very high effort).

According to CEB Global\*, 96% of customers with a high effort score showed reduced loyalty in the future, while that was the case with only 9% of those who reported low effort scores.



# CUSTOMER EFFORT SCORE (CES)

\* The company made it easy for me to handle my issue.

Strongly disagree	Disagree	Somewhat disagree	Neutral	Somewhat agree	Agree	Strongly agree
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# CUSTOMER EFFORT SCORE (CES)

Customers are much more likely to punish bad service than to reward good service.

The costs of exceeded customer expectations are high, while the payoffs are minimal.

Effort should be invested in making the customer experience and problem resolution *as easy as possible*.

# CUSTOMER EFFORT SCORE

Don't ask, *“How satisfied are you with this service?”*; ask, *“How easy was it to get in contact/get a service/have your issue resolved?”*

Relevance is crucial here. The time to pop the question is right after your customer had the experience.

# THINGS GONE WRONG (TGW)

This metric measures the number of complaints, or "Things Gone Wrong."

The standard approach to measure TGW is through complaint sections in customer surveys, but you could also maintain internal metrics.

**BIG DATA  
CAN GENERATE  
BIG BRAINSTORMS**

**USING THE  
DATA**

# USING THE DATA

Once you start measuring, you can start optimizing or making use of the data.

And, optimizing your customer satisfaction is one of the best investments you can make.

# USING THE DATA

Identify where improvement has occurred and where it is needed

Identify trends - what is working? What are successful practices?

What does this data tell us about fulfilling our mission?

Encouraging innovation and learning - you can get feedback on pilot programs or new approaches to service delivery

Informing board members and stakeholders about the quality and effectiveness of your work

Can be used to help attract volunteers and clients

# The Roma Cycle

Analyze Results,  
Compare with  
Projections





# WHAT DO YOU DO WITH THE DATA AND YOUR ANALYSIS?

Compile a report that includes :

A summary of the highlights of your analysis; describe the limitations of the data; provide a respondent profile (demographic and or services); findings from your analysis

Report should be reader-friendly - charts and graphics whenever possible

Include information on the nuts and bolts - response rates; description of analysis process

Include survey itself in the appendix

# USING THE DATA: NEXT STEPS

Discuss results with supervisors involved in service delivery

Discuss shortcomings constructively

Top management taking this feedback seriously is extremely important to reinforce the agency's focus on client results

# USING THE DATA: NEXT STEPS

Meet with staff - focus on worsening outcomes and on very good outcomes - what can we learn from this feedback?

What can we do to improve worsening or poor outcomes?

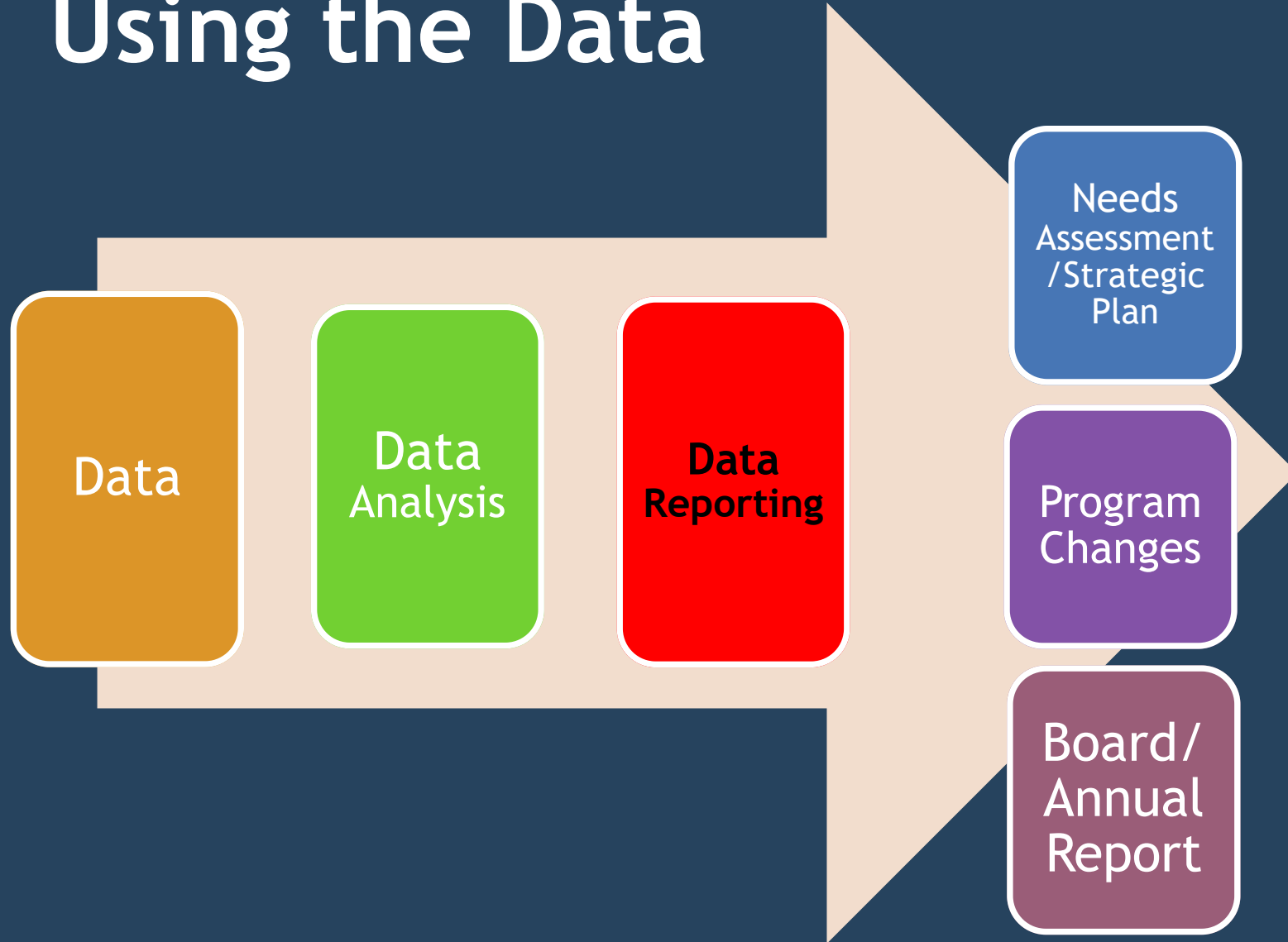
Do we need to change our expectations (targets)?

Meet with customers to discuss what we can do to improve

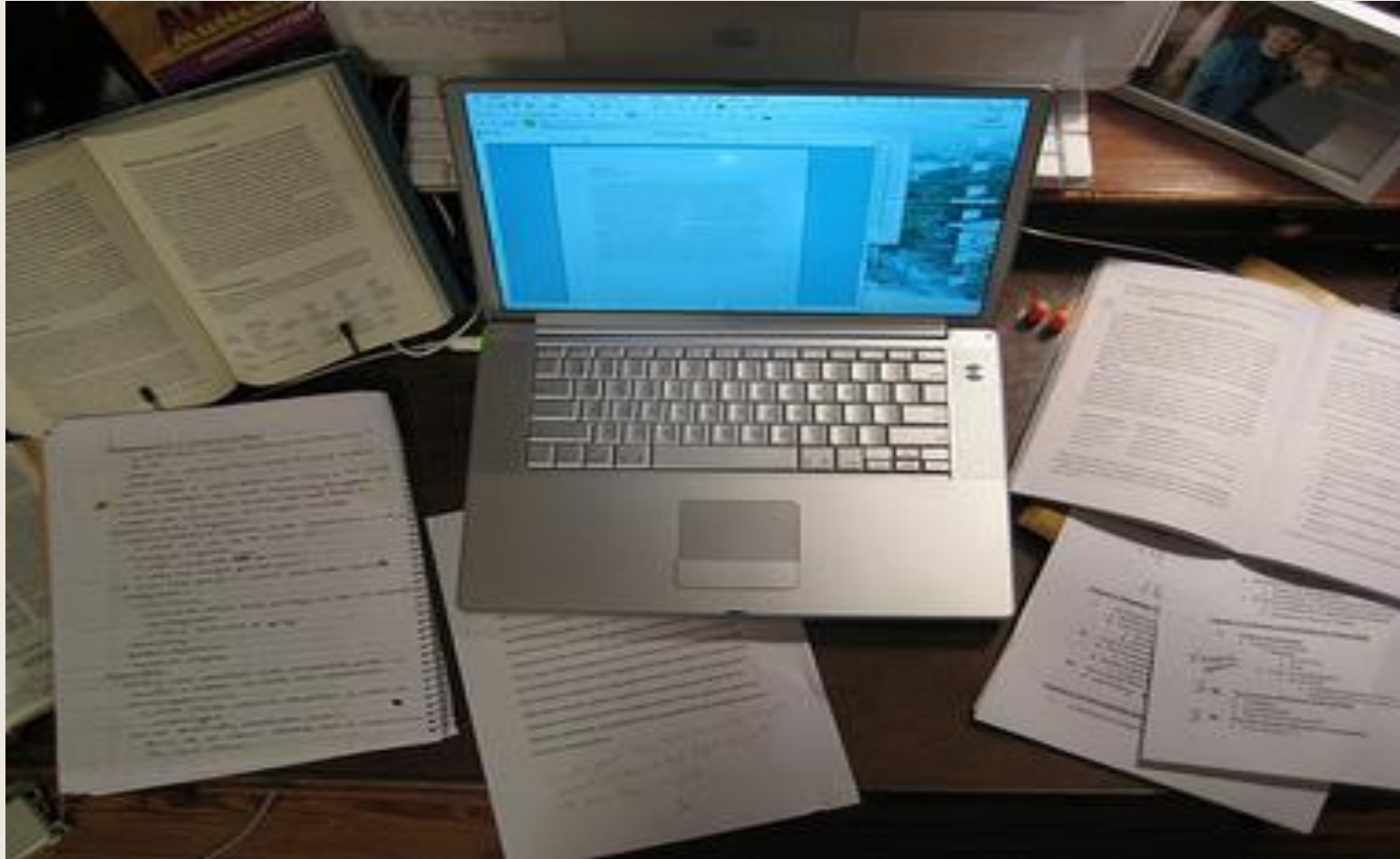
Plan for follow up on agreed-upon strategies for improvement.

Subsequent surveys provide data on effectiveness of strategies.

# Using the Data



# DOCUMENTING



# 1.3 DOCUMENTATION

## (1) Systematic Approach

Policy and procedure document describing operations of the customer satisfaction process

## (2) Collecting

Data collection instruments (surveys, focus group questions)

Summary data (reports, data collection schedules)

# 1.3 DOCUMENTATION

## (3) Analyzing

Policies and procedures documents describing how data is analyzed

Reports, scorecards, dashboards

Written reports and recommendations

## (4) Reporting...to the governing board

Policies and procedures documents describing reporting procedures

Written reports, scorecards, etc. submitted to the board

Board minutes indicating reporting of data

# MODEL CUSTOMER SATISFACTION PROCESS

Collect customer satisfaction data through multiple methods  
and sources

-

Regular assessment of data by quality improvement  
committee

Targeted follow-up interviews and focus groups

Quarterly leadership team reports to the board



# RESOURCES

*Surveying Clients About Outcomes: Series on Outcome Management for Nonprofit Organizations.* The Urban Institute - 2003

*Technical Assistance Guide: Category 1: Consumer Input and Involvement - Community Action Partnership*

*Customer Satisfaction* - Jarle Crocker and Barbara Mooney - April 28, 2016 Region III Webinar