



TRAINER'S BOX®

CUSTOMER SURVEYS:

How to Raise Your Sales & Marketing IQ in 6 Easy Steps

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Infusionsoft®



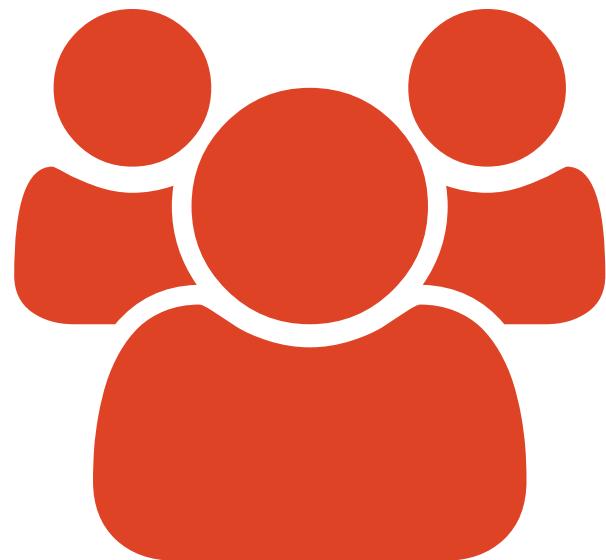
Introduction

Good small businesses listen to the concerns, suggestions and demands of their customers. But the best small businesses take that feedback and implement essential changes to meet the needs of their customers.

While it may seem easy to ask customers how they feel about your business, products or customer service, how can you record, organize and analyze their responses? What about the responses you get from face-to-face interactions? Are those customers being completely honest with you, or are they avoiding critical comments to spare your feelings?

The process of conducting market research and gathering customer feedback can be simplified by sending a survey. Asking a variety of questions will help inform the way you do business.

This e-book will guide you through the process of creating a survey, from setting a goal to creating a plan of action based on the findings. Read on to learn how a survey can provide a wealth of data you can use to improve the way your small business runs.



Step 1: Set a clear goal.

Surveys are a great way to gather information you can use to make better decisions across your entire company. **For example, surveys can be used to:**

- Gather feedback on new product and service ideas
- Measure customer satisfaction and find areas that need improvement
- Identify key traits of your most profitable customers and what influences them during the sales cycle

The most effective surveys have clearly defined objectives with questions that are related to the overall goal. This prevents the survey from becoming bloated with unnecessary questions, while ensuring that your research findings are actionable.

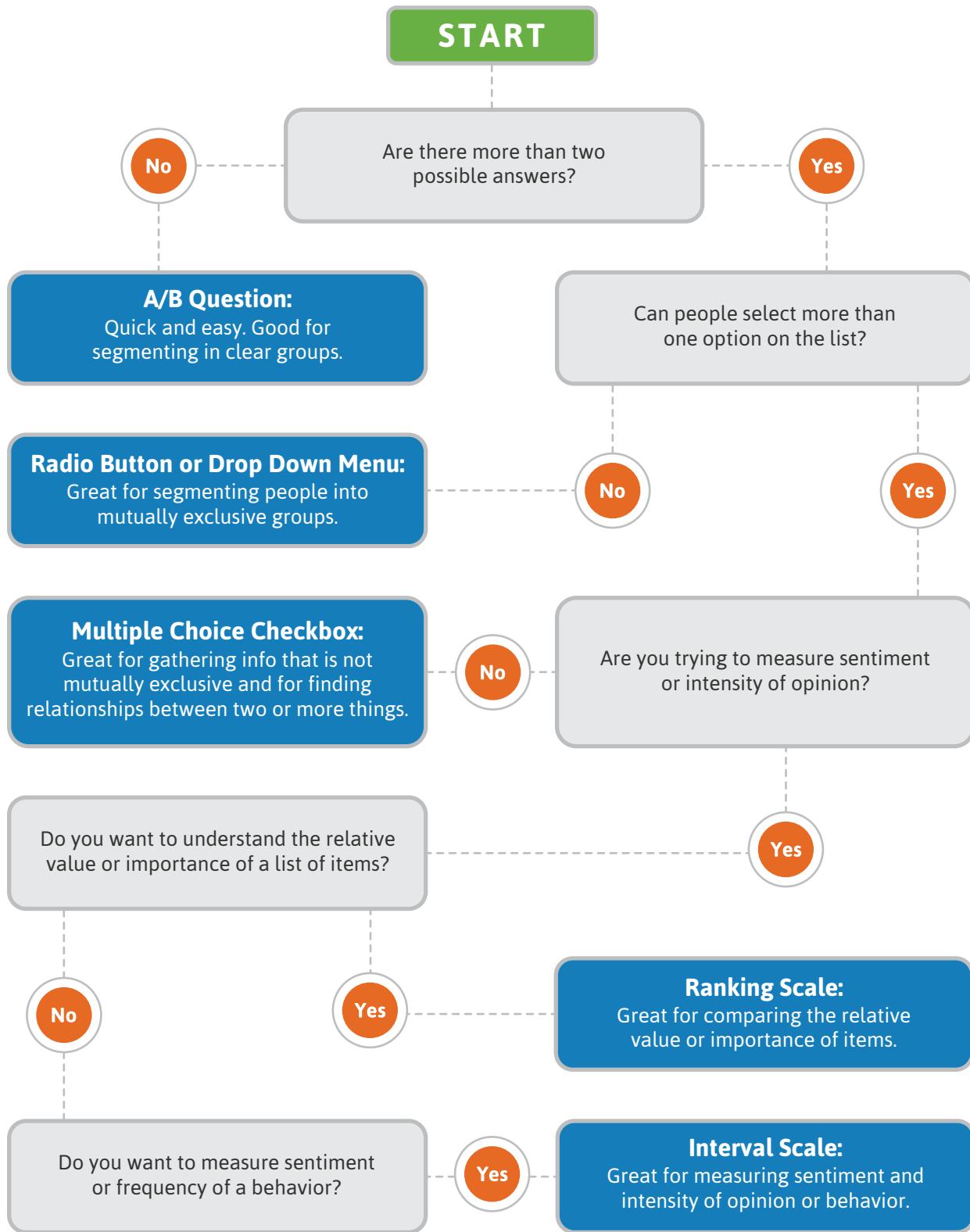
Step 2: Ask the right questions.

Surveys are great at gathering two types of data – objective facts and subjective states. If your goal is to identify your most profitable customers, you'll want to gather objective demographic data (age, marital status) as well as subjective information (behaviors, interests and opinions).

But beware. **The way you ask a question can have a big impact on the answers you receive.** When measuring customer satisfaction, you could use a numerical scale ("How satisfied are you on a scale of 1 to 5?"), Net Promoter Score ("How likely are you to refer us to others?"), an open-ended question ("How would you describe the quality of our customer service?") and more. The results and reports you get will vary greatly, depending upon your approach.

Knowing how to ask the right questions is more art than science. However, the table on the next page can help you identify the right types of questions to ask, based on the circumstances.

A Reliable Survey Starts Here: Ask the Right Questions



Step 3: Pay attention to how you ask the question.

The way a question is worded can have a big impact on results. Questions must be clear, direct and unassuming. Confusing, poorly worded or misleading questions can turn a promising research project into a mess very quickly. **Here are a few pitfalls to avoid:**

Avoid	Example	Alternative
Avoid combining two questions in one.	"How satisfied are you with the cost and speed of our delivery?"	Divide into two separate questions. <ul style="list-style-type: none">• "How satisfied are you with the cost of our delivery?"• "How satisfied are you with the speed of our delivery?"
Avoid asking a question in a way that implies or suggests a correct answer.	"On a scale of 1 to 5, how great was the movie?"	Rewrite in a neutral tone. <ul style="list-style-type: none">• "On a scale of 1 to 5, how would you rate the movie?"
Avoid overly general questions.	"How would you rate our company?"	Be more specific. <ul style="list-style-type: none">• "How would you rate the quality of our product?"
Avoid asking overly personal questions, unless they directly relate to your product or service.	"What is your age?"	Provide a "prefer not to answer" option.

Step 4: Test, test and retest your survey.

The majority of surveys are now conducted online. You can choose from a number of affordable, easy-to-use online survey tools to set up and administer your survey. Each option has advantages and disadvantages, but regardless of which solution you use, always test your survey before distributing it to customers.

Share your survey with co-workers, friends and family to get a wide range of feedback. Look for spelling and grammar mistakes, in addition to errors like leading questions or responses that are not mutually exclusive. **It is very important to identify and correct any errors before launching the survey.** Remember, once it's live, you can't "take it back."

Once you have tested your survey and are confident the questions are clear, it's time to start gathering feedback from your target audience.



Step 5: Create incentives and minimize friction.

There are two primary factors that impact the number of people who will complete your survey—motivation and friction.

Offering an incentive for participation, such as a free gift or raffle entry, can greatly increase motivation. It also helps to simply explain the purpose of your research. To create a sense of urgency, set a deadline to complete the survey.



Friction is anything that makes it difficult to take the survey, such as length or the difficulty of questions. Keep the survey short to prevent fatigue. As your survey gets longer, fewer people will complete it. **A typical survey should take no longer than 5-7 minutes to finish.**

Don't make your respondents think too hard while taking the survey. By reducing the number of open-ended essay questions and complex ranking questions, you can raise the overall response rate. A good rule of thumb is to limit the number of required questions. Otherwise, you may see lower overall response rates.

Step 6: Avoid analysis paralysis.

Once you've gathered your data, it's time to crunch numbers and create reports. There are so many potential ways to slice and dice the data that it can become overwhelming.

To keep things simple, start with an overall analysis that includes data from all survey respondents. This chart outlines common types of reports you can create from survey data, and explains the advantages of each type.

Type	Advantages
Pie Chart 	<ul style="list-style-type: none">Great for showing the percentage contribution of a segment to the whole.Often used to display demographic information.
Bar Graph 	<ul style="list-style-type: none">Great for making comparisons and illustrating differences between groups.Commonly used for showing responses to multiple-choice questions and rating scales.
Line Chart 	<ul style="list-style-type: none">Illustrates trends in data over time.
Crosstab Report 	<ul style="list-style-type: none">Shows you how data from two questions are related.

Once you've completed your overall analysis, identify two or three possible ways of slicing your data for further review. For example, you could segment your data by industry or annual revenue to see if there is a difference in behaviors between the groups.

Avoid the temptation to oversimplify the meaning of the data. While it can be exciting to uncover findings in your data, remember that outliers can skew your data in unexpected ways. Know your margin of error and keep that in mind when comparing groups. You generally need at least 100 respondents in one group for the analysis to be meaningful or trustworthy.



Finally, don't lose sight of the original goal of your survey. Charts and graphs are fun, but stay focused on the data that supports your research objectives and provides insight to bigger questions. Data and statistics can supply the numbers, but only you can make sense of them in the context of your business.

Conclusion

Surveys are an excellent form of gathering customer data to influence the course of your business, but they must be handled carefully. Questions cannot be open to interpretation and must align with the overall goal of the surveys. Additionally, the findings must be looked at objectively and interpreted in a way that will allow you to establish a course of action. When executed properly, surveys can open the eyes of your small business to issues you didn't even know existed or highlight things that your company is doing exceptionally well. Most importantly, stay focused on survey goals and proper execution. By conducting meaningful and accurate customer surveys in 6 easy steps, you can substantially raise your sales and marketing IQ, helping your business to succeed.

About the Authors

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Andrea Parker is a Brand Journalist at Infusionsoft, and helps small businesses succeed by creating original content for and managing the Big Ideas Blog, as well as creating e-books and infographics for small business consumption. Andrea is an award-winning writer and former professional steeplechaser with a penchant for reading, tutoring and baked goods. You can follow Andrea on the [Big Ideas Blog](#) and on Twitter [@BigIdeasBlog](#).

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