



SERVICE DESK INSTITUTE

How to create brilliant surveys

GUIDE

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Introduction

We all know how important it is to gather customer feedback. Taking the temperature and pulse of our customer base is one of the key indicators of success for our service desk, and many of us rely on surveys to understand how the customer feels. Something that can often get lost along the way, is that it's incredibly important to get the survey right.

All too often surveys are un-engaging, badly worded, with misleading or confusing questions, poorly presented, or simply do not match the initial brief.

"For any of us publishing experience related surveys, we may need to look again at the questions we ask, how we ask them, and what we hope to find out".

Surveys, used in conjunction with qualitative research techniques (for example, user groups, face to face exchanges, interviews, and informal conversations) can offer a revealing insight into the hearts and minds of your end user community.

FEED
BACK

Types of surveys

There are several types of surveys you can create & conduct. Here are some general types:

Event Based Survey

- 01** The Event-Based Survey allows the individual to track trends in satisfaction with current services. They are regular, continual surveys (i.e. an automated follow-up survey after an incident is closed). They should be **short (4 to 5 questions)** and quick and easy to complete.

Managed well, this type of survey is one of the most effective ways to **'keep a finger on the pulse'** of customer perception.

Focus Groups

- 03** A Focus Group is a select group of customers meeting and discussing predetermined issues. Where someone from the Service Desk **leads the questioning** of the group, taking minutes and reporting the findings back to the team.

One-time/One-off Survey

- 02** The One-time/One-off Survey is not completed at regularly scheduled intervals but is undertaken for specific reasons, such as a change in the service provider.

This survey is a valuable tool to use after a service outage, implementation, out-source or major rollout.

Periodic/Annual Survey

- 04** The Periodic/Annual Survey is planned and scheduled on a periodic basis, normally part of an annual survey cycle. Sometimes they are undertaken **6 monthly** or **quarterly**. They are generally based on **customer perception** of the IT organisation, including the Service Desk, during the previous year or period of time since the last survey of this type was undertaken.

This type of survey should measure the same elements and allow an organisation to trend service improvements year-on-year.

SDI Recommended Surveys

At SDI, **we recommend** using a few **different types of end-user surveys** to collect feedback, including the following:

01 Net Promoter Score (NPS)

This survey assesses customer loyalty and satisfaction by asking consumers to rate their likelihood of referring the company's products or services to others.

SDI TIP

Use a simple, one-question format for NPS surveys and conduct them regularly to track trends over time.

02 Satisfaction survey

This survey measures the level of customer satisfaction with the company's products or services, such as response times, and issue resolution.

SDI TIP

Use a 5-point or 7-point scale for satisfaction surveys, including closed-ended and open-ended questions to gather quantitative and qualitative data.

03 CSAT Surveys

This survey is used to measure customer satisfaction by asking customers to rate their satisfaction with a specific service or interaction.

SDI TIP

Make sure to use a combination of multiple-choice questions, a scale for rating questions and to provide a way for customers to follow up.

04 Event survey

This type of survey is usually used to gather feedback on the service provided by the service desk after incident resolution or service request fulfilment.

SDI TIP

Make sure to conduct event surveys within 24 hours of resolution or fulfilment to capture the feelings and opinions while they are still fresh in customers' minds.

05 Exit survey

This survey is used to gather feedback from customers after their interaction with the service desk is completed.

SDI TIP

Use a combination of closed-ended and open-ended questions to get valuable information you can use to increase retention.



Digital Employee Experience (DEX) Surveys

Digital employee experience (**DEX**) is focused on the quality of the employees' experience when using technology, and how employees interact with and make use of, hardware or software in the digital workplace.

DEX significantly **impacts productivity, employee engagement, and customer experience**, and it's undoubtedly an essential element of the overall employee experience (EX). This means an improved DEX, can improve employee satisfaction and productivity.

When creating a DEX survey, think about some of the following questions:

- **Performance:** *How fast are the devices or tools you are using? Are they well configured to enable you to do your work? Are they available to use when needed?*
- **Technology accessibility:** *How easy is it for you to access the technology tools you need to do your job effectively? Do applications crash often? How do these issues affect your work?*
- **Remote work:** *Do work-related tools enable you to work anywhere effectively? How well do you feel connected to your colleagues while working remotely?*
- **Collaboration:** *How satisfied are you with the collaboration tools provided by the company? Do these tools boost productivity?*
- **Experience:** *How satisfied are you with the overall usability of the company website? How quickly were customer service inquiries resolved? What do you think could improve customer experience?*



Step 1 – Why?

Every great survey starts by answering the following three questions:

- Why are you running it?
- What will you do with the results?
- How will the information help you and your end users?

Let's run through those three questions and look at some typical responses.

Why are you running it?

Sounds obvious right?

You are running this survey because you want to understand how users feel about the service you are delivering to them. But of course, there is more to it than that.

All considered there are **100s of questions** that you could ask, but ultimately only you will know what you truly want to find out.

What do you want to find out?

Is it how users feel about the service?

Is it how professional the team are?

Is it how quickly incidents are responded to?

Is it the ease of contacting someone and not having to wait?



Still, to point you in the direction of **potential questions**, the table below shows the results of research that we conducted into the kinds of survey questions that service desks ask their end users.

Rank	Question	%
1	Are the IT support staff professional and courteous?	12
2	Do the IT support staff communicate effectively?	11
3	Is there a clear and easy mechanism for reporting issues to the Service Desk?	10
4	Is the availability of IT support at an acceptable level?	9
5	Do the IT support staff take ownership of the reported issues?	9
6	Is there a quick and accurate resolution of problems?	8
7	Would customers recommend the service?	8
8	Do the IT support staff demonstrate an understanding of the business objectives?	8
9	In your view are the IT support staff technically competent?	6
10	Are the IT support staff responsive?	5
11	Is the service offered reliable?	5
12	Does the business value the relationship?	4
13	Are IT support staff trusted by users to get the job done?	4
14	Do the IT support staff demonstrate initiative?	1
15	Other	0

So decide why you are running the survey and what you hope to find out.

What will you do with the results?

One of the **key things to consider** when creating surveys is what you will actually do with the information you receive back. What do you hope the survey results will tell you? Will the answers help you to identify ways to improve or change?

Answering these two questions will help you to understand if the questions you are asking are the correct ones and will shape the way that you design the survey.

How will the information help you and your end users?

If you create a successful survey, then you will collect a lot of data. The trick is to understand what this data will actually enable you to accomplish.

You will find out a lot of data surrounding people's thoughts and feelings about the service you are delivering, and some of it may be less than complimentary.

The key to **brilliant surveys** is not just in the questions you ask, but in what actions you take as a result. You should not ignore what people have said, or fail to go back to the respondents to follow-up with them on the actions being taken as a result of the survey, using a 'you said, we did' approach.

If people have given up their valuable time to complete the survey (and ultimately help you) then you should repay the favour and demonstrate how much you value their feedback.

This is so important, that it's worth considering setting expectations and your commitments in the first sentence of the survey introduction:

"We understand that you are very busy, could we politely ask that you spare us 5 minutes of your time to share your thoughts with us.

We are continually working to improve the service provided by the service desk. To better support and serve you going forward, we need your feedback. We promise to review your feedback and let you know within 1 week of the survey completion, if and how we are able to use your feedback to improve our service. Thank you for your time.



Step 2 – Survey design

If someone tells you that there are set ways to create surveys or questions that you must ask then, quite frankly, they may not fully understand the nuances of experience management.

Survey questions and design will vary depending on what you want to find out (hopefully you will have established this from step one of the process). Maybe you don't want to know if your staff are professional – it might be much more important to you to understand if they understand individual's business needs and requirements.

It's good practice to set a limit on the number of questions you should consider asking in a survey. If there are any burning questions that don't make the cut, then consider asking them as part of any further qualitative research work.

Design includes the **flow of the survey**, which will largely be dictated by the questions and the choices that are available to respondents.

But design also considers the look and feel of the survey – think about keeping it clean, fresh, accessible, clear and attractive. If possible **brand the survey** to match the format of your organisation to encourage the respondents to see that the survey designed is to help improve the organisation, not just to help the people in IT.

Also, if you are asking for ratings on a scale consider moving to a **1-4 scale (very poor to very good)** to encourage people to make a decision rather than sitting on the fence – after all, if someone rates you as 'okay' what does that actually tell you?

A common problem with surveys is that respondents can choose to select the same boxes repeatedly in a survey to complete a survey quickly. There may be less meaning to that kind of survey result but it doesn't necessarily mean a respondent has just randomly selected the same box throughout the survey. If you spot regular patterns like this, don't let it dishearten you or frustrate you. See it as an opportunity to contact the respondent and have a discussion to qualify the survey outcome. It's a great way to show survey respondents that you are focussed on their survey responses and that there is due diligence in the survey process.

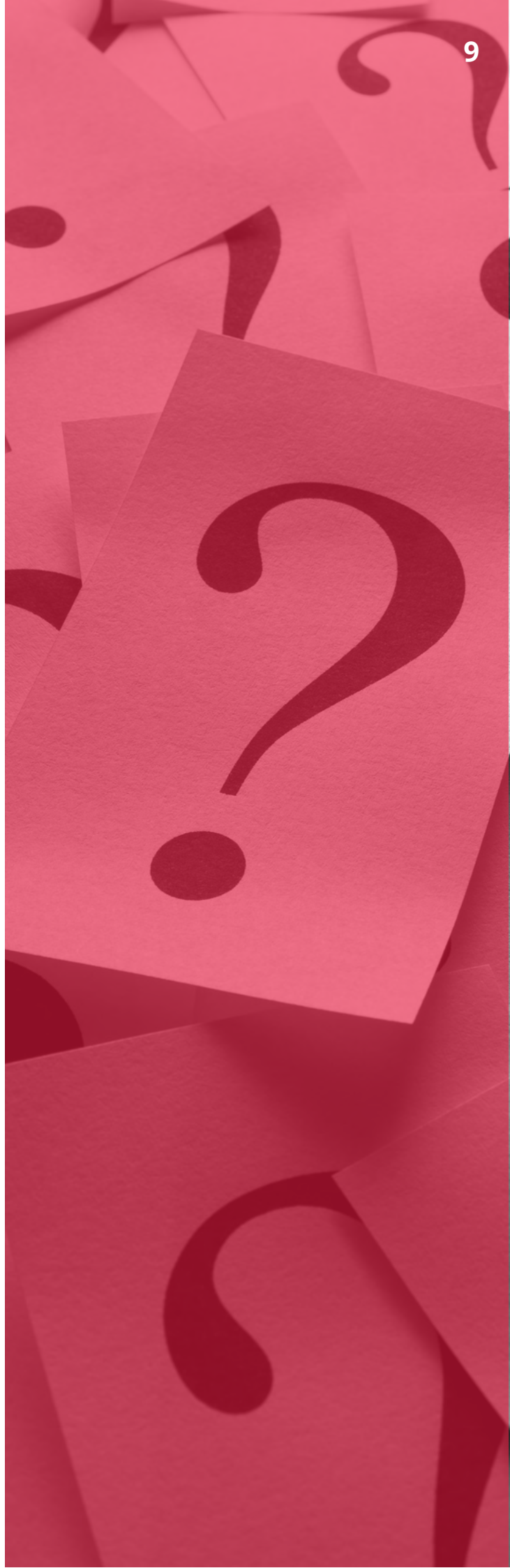
You can also combat this by **varying the questions** and the way that they are answered. Consider using a variety of question types (detailed below) to help address this.

Step 3 – The questions

When it comes to the questions, there are some top tips to getting your surveys right.

Most are common sense, but it's sometimes handy to have a checklist for reference to make sure that you are not straying too far from your initial objective.

- 01 Ensure all questions are relevant to you and the respondent
- 02 Make sure questions are unbiased (i.e. avoid questions such as “we’ve suffered major budget cuts this year but are still really, really try to do a good job. With further cuts on the way please rate our service between 1-4)
- 03 Phrase questions using language that is familiar to the respondent – avoid jargon, colloquialisms, abbreviations, and making it too wordy or technical
- 04 Group similar questions together



05 Open-ended, closed and multiple choice. These **3 different types** of questions will produce different sets of answers and fulfil different purposes:

- **Open-ended:** This style of questions allows respondents to express themselves and provide additional commentary and information. This can be useful if you want to understand more about what respondents are thinking and feeling. I.e. what do you think about the Service Desk Analysts' level of knowledge? Have you got any examples of when a Service Desk Analyst provided you with excellent service?
- **Closed:** These questions direct respondents towards a single answer, i.e. do you currently use self-service?
- **Multiple choice:** A list of pre-determined options that respondents can select from, i.e. how many times do you contact the service desk every week? 1, 2, 3, 4 times etc.

06 **Logic:** This is a term that will be familiar for anyone who runs online surveys. Logic allows you to direct respondents towards certain questions or set of questions depending on their previous answers.

For example, if you started the survey with “do you use the service desk?” you could then create a logic branch for those who answered ‘yes’ and ‘no’. For a yes response, you might want to find out what they thought of the service. For those who answered ‘no’ it could be of interest to find out why they have not used the service desk before.

Step 4 – Incentives

To encourage people to complete a survey, incentives can really help to push up the response percentage. **Offer incentives** such as discounts, coupons, or sweepstakes entries to encourage users to complete the survey.

A regular or one-off prize draw from the list of respondents may be a good way to continue to incentive survey completion. In some cases, a small prize can also help to **raise response rates**.

However, broadly there are **two potential problems** with offering incentives. One is the **lack of budget** for prizes. The second is that incentives can encourage people to complete the survey without really thinking about their answers – this can lead to **misleading survey data**.

The best way to incentivise people to complete the survey is to make them feel involved, valued and appreciated. If you can make respondents feel important and that you are all on the same journey, this can have a marked impact on completion rates, with the added benefit that the survey is completed by people with something they want to say and share.



INCENTIVES

Step 5 – Distribution & promotion

There are lots of different ways to distribute surveys including, but not limited to:

- 1 Online
- 2 Email
- 3 Intranet
- 4 In-person
- 5 Social media
- 6 Pen and paper
- 7 Distributed by people/groups on your behalf
- 8 In-app notifications

You can of course use a **combination of each** of these for maximum impact. The channel to use will depend on your organisation's structure and the people you are trying to target.

For the survey to be a success, service desks should market the survey effectively to raise awareness and **encourage people to respond**. Promotion doesn't stop at motivating people to complete surveys; it should continue after the results of the surveys have been analysed.

It is vital that the results of the survey are disseminated to all invested parties and stakeholders so that they can see how the service is performing. Ideally, you could also include historical data so that customers can see how customer service has changed over time. You should also consider including action points about issues raised in the surveys and how they will be addressed.



Step 6 – Monitor the response rate

The biggest question for service desks who conduct **customer satisfaction surveys** is, what is a good survey response rate?

The answer will vary widely by the type of industry that you work in (high-pressured businesses like investment banks or stock traders are less likely to fill in surveys). Still, a good rule of thumb is that **10 percent** or higher is a positive return, with around **5 percent** being an **average return**. Consider setting a **SMART target** for survey responses to enable you to gauge how well response rates are performing.

Also, consider setting a **stretch target** to aim toward and regularly reviewing the response rate performance. If you are not meeting your targets, it may be an opportunity to engage with a section of the end user community to understand why response rate targets are not being met. Once understood, you could find further opportunities to increase the survey response rate based on the end user feedback.

If **response rates are low**, then it's worth thinking about whether survey fatigue has set in or if the channels that you are using to promote the survey are simply not working anymore. Historical data on return rates should reveal the most effective channels and survey types.



Step 7 - Feedback

Customer satisfaction and feedback is a **key driver** for service improvement. This is why any complaints or feedback should be respected and managed in the most appropriate way.

For example, a complaint is not necessarily negative, as it demonstrates that end users care enough to raise the issue with the Service Desk. If you can engage end users in conversation, it provides an ideal opportunity to **understand the customer's issue**, discuss ways in which the situation can be resolved, and potentially put in place measures to ensure that it will not happen again.

Any kind of feedback, positive or negative, is a vital way to **improve service** as it should ensure that the service delivered by the Service Desk matches end user expectations. Understanding your end users can help to significantly improve service.

Taking feedback and turning it into continual improvement is how a service desk becomes a great service desk.

Service desks that respond to customer feedback will be seen as **proactive**, and earn the trust of their end users by sharing with them the improvements that they have made. Think about a 'you said, we did' scenario. It's a really powerful message to say that 'X percent of respondents told us that we took too long to answer the phone. We've taken this on board and made changes x, y and z and have improved the average speed to answer by X'.

This demonstrates that you are not only being proactive but that you also care about what your end users have to say. In turn, this helps to **build a stronger relationship** with your end user community. It can also make end users more likely to respond to future surveys, as nobody likes filling in a survey and giving up their time, only to see no changes or actions as a result of their feedback.

SDI Tip

Communicate to customers the changes that were made as a result of their feedback, and never forget to thank them for their participation.

Conclusion

The end user communities, customers and colleagues we support should drive much of what we do as a Service Desk, from the range of services we provide to the way we manage every step of a service interaction and the preceding life cycle management.

This has always been true, but perhaps now more true than ever. Every day millions of people make **purchases** and **transactions** with shops, supermarkets and online retailers. There are so many places to buy what we want that competition is fierce, not only on price but on keeping customers happy and satisfied. Treat a customer, end user or colleague well, and they're much more likely to use a service again and build trust in a service. The higher the bar is raised in the retail sector, the higher the expectations of our service desk customers will become.

How we **meet these expectations** is a constant challenge for any Service Desk, and it should be a challenge because we constantly strive to improve, meet and exceed the demands of our increasingly experience savvy customers. **Good service** is no longer adequate; what organisations are looking for now, is exceptional service with the employee and customer at the heart of everything we do.

A great way to test the experience you offer to customers is to ask:

- *'Would you recommend this Service Desk to a friend or colleague?'*
- *If your Service Desk was situated on the high street and customers were able to choose whichever Service Desk they wanted, what would make yours stand out?*
- *What would keep customers coming back and remaining loyal to you?*
- *What would make them recommend you and sing your praises?*

Understanding **what makes** your Service Desk great and how it can be improved, really does offer opportunities to continually improve the service experience you deliver, helping to make organisations more resilient and position the Service Desk as a key organisational strategic asset.

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