

Critical Success Factors

Building Support

Top-level support and commitment for the survey as a tool for change, driven by a stated commitment to put the customer front and center

Early buy-in from the organization

Keeping the survey visible

Managing the Process

Skilled project management

Designing and Administering the Survey

Sound sampling methodology

Well-designed, actionable questions

Ample time and access for vetting questions

A dependable survey engine

Incentives to participate

Appropriate and timely reminders

Reporting the Results

Timely and accurate analysis

Astute reporting of survey highlights

Sharing detailed results with service leaders in an appropriate manner

Putting the Results to Work

Letting the chips fall where they may

Developing action plans that align with the results and following through

Keeping the survey visible

Communicating results and progress to the organization and its customers

Cautions

The survey process is powerful, but...

All of the critical success factors mentioned above are just that—critical. If an organization isn't prepared to engage in this process wholeheartedly, it may well be better off not attempting it at all. Failed efforts not only consume resources—they breed cynicism, creating ever-higher hurdles for future efforts.

It's important to recognize that the survey and the results are artifacts of a much larger strategy/process. Skillful management of this process is key to realizing the full benefits of this kind of effort.

The process of designing actionable survey questions is more challenging than it appears. After three iterations of the survey, we have gained a lot of valuable experience on how to get the most out of each question, but we continue to learn about how to improve both the questions and the process of designing them.

The results have to be credible to be of any use. This means the methodology must hold up under close scrutiny; the analysis of the data must be accurate and complete. To avoid appearances of conflict of interest it is extremely helpful to have a neutral party responsible for managing and analyzing the data.