# Conducting a Customer Survey

## Part 3 of 3

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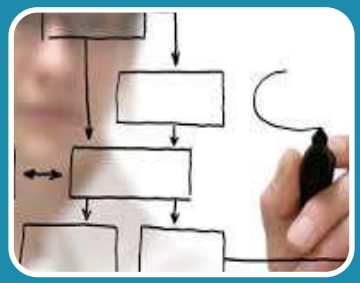
# Purpose of the Webinar Series

- Provide guidance to grantees in planning, designing, and conducting high-quality customer surveys

# 3-Part Webinar Series



## Planning a Customer Survey

- Purposes of customer surveys
- Who, what, where, how, and when
- Reducing response bias


## Designing a Customer Survey Instrument

- Instrument design
- Item development
- Pilot testing


## Conducting a Customer Survey

- Modes of data collection
- Enhancing response rates
- Data analysis and use

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# Takeaways from Webinar 1

- Plan, plan, plan
- Position your survey within the framework of a logic model, evaluation plan, and evaluation questions.
- Think about the ultimate uses of the data and let that drive your design.
- A small systematic sample is better than a large convenience sample.
- Consider available fiscal and human resources.

# Takeaways from Webinar 2

- Start with the overall goal for the survey and then identify specific and measureable objectives.
- When designing the survey, consider
  - what information you need to know,
  - how well will the information you obtain will help you meet the objectives, and
  - what types of questions will provide the information needed.
- Be purposeful in the design of your survey, including the length, format, and item construction.
- Pre-testing is critical for ensuring development of a high-quality survey instrument.

# Overview of this Webinar

- Modes of data collection
- Enhancing response rates
- Data preparation and use

# Modes of Data Collection: How should you collect your data?

- Telephone or cell phone
- Self-administered
  - Mail and paper-and-pencil
  - Web page
  - Email
    - Link to online survey
    - Fillable PDF or word document for printing
  - Smart phone and tablet
- In-person interviews
- Mixed-mode

# Advantages of Different Modes

| | Phone/ Cell Phone | Electronic (Tablet/ Smart Phone, Web/Email) | Mail | In-Person |
|---|---|---|---|---|
| Cost per respondent | M/H | L/M | L | H |
| Time to administer | M/H | L | M | H |
| Response rate | M | L/M | L | M/H |
| Staffing requirements | H | L | M | H |
| Ability to handle complex skip patterns | H | H | L | L/M |

L=Low, M=Moderate, H=High



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# Comparison of Some Free Web Survey Tools

| Free Versions | Survey Monkey/ Zoomerang | QuestionPro | kwiksurveys |
|---|---|---|---|
| Number of questions | 10 | 10 | No limit |
| Responses per survey | 100 | 100 | No limit |
| Question types | 13 | 15 | 21 |
| Skip logic | Not free | Free | Free |
| Export Data to Excel, CSV | Not free | Not free | Free |
| Export to PDF or Word | Not free | Not free | Free |
| Phone support | Not free | Not free | Not free |
| Accessible | Yes | Yes | No |

# Managing Data Collection

- Create a timeline with milestones
- Identify personnel
- Maintain data security
- Log and track responses
- Ensure quality control

# Problems with Customer Surveys: Low Response Rates

- "A low response rate does more damage in rendering a survey's results questionable than a small sample, because there may be no valid way of scientifically inferring the characteristics of the population represented by the non-respondents" (American Statistical Association, 1997, p. 7).
- Response rates
  - 85% or better is excellent;
  - 70% to 84% is very good;
  - less than 50% is not representative

# Enhancing Response Rates

- Give a reasonable amount of time for participants to receive, respond to, and return the survey.
- Combine data collection modes (e.g., use both telephone and web, or email and paper-pencil)
- Make multiple contacts with respondents
  - Pre-notification
  - Personalized invitation with questionnaire
  - Thank you follow-up
  - Reminder with replacement questionnaire
  - Final reminder
- Ensure confidentiality
- Offer incentives

# Checking for Non-response Bias

- If your response rate is between 50% and 70%, consider doing a non-response bias analysis
- Substantial differences between respondents and non-respondents may indicate bias in the data
- Test for non-response bias
  - Follow-up with a sample of non-respondents
  - Compare responses based on selected characteristics (e.g., gender, occupation, length of time in program)
  - For mixed-mode surveys, compare responses between modes
  - Compare responses between initial and late responders

# Data Preparation

- Input/enter data accurately
- Clean/edit data
- Code data

# Accurate Data Input or Entry

- Data entry methods
  - Direct input by respondent (e.g., electronic survey)
  - Manual data entry by survey administrator
    - Scanning
    - Keying quantitative or close-ended responses
    - Transcription of qualitative or open-ended responses
- Manual data entry requirements
  - Training users to use scanning equipment and software or database/spreadsheet software
  - Establishing data entry procedures
  - Checking original data against entered data

# Data Cleaning and Editing

- Check for
  - Duplicate entries
  - Consistency
  - Outliers
  - Missing data
- Replace text with numbers
- Identify inclusion criteria

# Data Coding

- Assign number codes to scaled or ranked responses
- Code responses to open/unstructured items
- Code missing data
- Code “Other (specify)” responses

# Sample Data Codebook

| Variable Name | Description | Data Collected | Units | Data Type | MaxSize | Values and Value Restrictions (blank=none) |
|---|---|---|---|---|---|---|
| AGE | Age of child | | Years | numeric | 2 | 3-15 |
| SEX | Gender | | - | numeric | 1 | 1 = Female<br>2 = Male |
| RACE | Race | | - | numeric | 1 | 1 = Caucasian<br>2 = African American<br>3 = Other |
| DATE | Date of event | | - | date | 6 | mm/yyyy |

# Data Security and Retention

- Ensure data security
- Protect anonymity and confidentiality
- Retain and store data

# Data Security

- Access control (limited to specific personnel)
- Authentication (passwords)
- Automatic lock activation (in the event user forgets to log-out)
- Regularly scheduled updates to antivirus software
- Firewalls
- Data encryption
- Physical security (e.g., cabinets and rooms with coded keypads)
- Secure disposal of records (e.g., shredding paper, electronic “wiping” of computer disks and audio or video recordings)

# Privacy Assurance

- Anonymous – cannot be traced to respondent
- Confidential – can be traced but is not inappropriately disclosed
- Mask personally identifiable information (e.g., names, addresses, phone numbers, gender)
- Train personnel

# Data Retention and Storage

- Consider:
  - How long to retain data?
  - How to store data?
  - Where to store data?
- Remember to use secure methods of data destruction, including destroying backup copies

# Analyzing Data to Meet Survey Objectives

- Descriptive statistics, including variance
- Subgroup analyses
  - Type of respondent
  - Service provider, region, or location
  - Threat to confidentiality
- Advanced analysis considered and conducted if appropriate (e.g., factor analysis, reliability, regression).
- Documenting changes over time
  - Graphing data
  - Revised items
  - Pre/post design effects
- Using results from open-ended questions

# Takeaways

- Give careful consideration to the mode of data collection in light of your survey population and content.
- Take the necessary steps to maximize response rates.
- Enhance data quality, and save time and money, by planning ahead for data collection, analysis, and reporting.

# 1st and 2nd Webinars in the Series

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# Additional Resources

- https://www.whatisasurvey.info/
- Fink, Arlene G. 2008. *How to Conduct Surveys: A Step-by-Step Guide*. Thousand Oaks: Sage Publications. http://www.socialresearchmethods.net/kb/survey.php
- Dillman, D., Smyth, J., & Christi, L. (2014). *Internet, Mail, and Mixed-Mode Surveys: The Tailored Design Method*, 4th Edition.
- http://broadeducation.org/asset/1344-schoolsatisfactionsurveys.pdf

# Questions?

Contact us:

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