



## Tool 9

# Customer Satisfaction Survey

Customer satisfaction surveys are highly useful evaluative tools that can be adapted and employed throughout your process, although they're especially practical during prototyping and testing. A survey is a quick way to generate

data to validate or disprove your hypotheses. Ideally, surveys are executed at regular intervals so you can continue to make adjustments and iterate on ideas until you've refined and validated a solution that's ready to scale.

**PRO TIP – A formal survey is one approach to gathering customer perspectives on your prototype. But most prototypes benefit from both formal and informal analysis. You may want to collect more nuanced feedback by conducting short group or intercept interviews to gather qualitative insights, noting what people liked/did not like, found clear/confusing, or shared as relevant ideas/considerations.**

### STEPS

1

#### TARGET PARTICIPANTS

Select your target and exposed group of customers up front (see targeting template, page 69). Ensure that survey administrators are experienced and adequately trained.

2

#### TAILOR SURVEY QUESTIONS

Create a survey based on specific aspects of the project or prototype you plan to test. For example, if you've changed the decor of a bank branch, create a survey that will reveal first impressions and the overall experience of visiting customers.

3

#### STAGING AND ROLLOUT

Administer the survey in the local language, and, if applicable, as soon as possible after you've implemented your prototype or intervention. You may choose to conduct surveys at several points throughout the process.

4

#### COLLECT AND APPLY FINDINGS

Optimize data collection to quickly obtain and synthesize results so you can incorporate changes to your project on an ongoing basis. Use SurveyMonkey, Google forms, or other similar online tools.

#### SUGGESTED TIME

2-8 hours

#### ROLES

2-4 collaborators

#### MATERIALS NEEDED

template, pages 68-71  
pens  
paper  
sticky notes

*The short survey (pages 68-71) is used to collect feedback from customers on their perceptions of prototypes and overall experiences. It includes 4-5 questions with responses collected on a 5-point Likert scale. To execute a successful survey, plan ahead adequately before launching.*



### Reference: Customer Satisfaction Survey

Janalakshmi Customer Experience Playbook



## Tool 9

# Customer Satisfaction Survey (1/2)

PROJECT / SUBJECT:

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**OBJECTIVE** Which specific aspect of customer experience are you trying to gauge? What hypotheses are you testing?

### FORMAT REQUIREMENTS

**Language and Literacy** - What language considerations are necessary to accommodate participants?

**Media and Technology** - Will the survey be administered on the phone or in person? What level of familiarity with technology is necessary for participation?

**Compensation** - Should participants be compensated for time spent completing the survey, or is it voluntary?

**Facilitators** - What level of training is required for facilitators conducting the survey? Do they need to be internal or external to the organization?

SURVEY DATE / LOCATION:

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PARTICIPANT PROFILE	EXPOSED GROUP	CONTROL GROUP
Number of Participants		
Age Range		
Income Range		
Financial Characteristics		
Exposure to Product / Service		
Familiarity with Organization / Brand		
Geographic Distribution		
Recruitment Timeline Strategy		



## Tool 9

# Customer Satisfaction Survey (2/2)

TARGET GROUP	SAMPLE QUESTION*	1	2	3	4	5
	<i>*Note: Questions from a previous project. You'll craft your own relevant questions.</i>					
Both	How <b>comfortable</b> do you feel at the [service location]?	Very comfortable	Somewhat comfortable	Neither comfortable nor uncomfortable	Somewhat uncomfortable	Very uncomfortable
Both	When you have questions, how adequate do you feel the <b>information</b> provided at the [service location] is?	Very adequate	Somewhat adequate	Neither adequate nor inadequate	Somewhat inadequate	Very inadequate
Exposed group	Have you <b>noticed any changes</b> at the [service location]? (Yes/No) If yes, how much do you like these new changes?	A lot	Somewhat	Indifferent	Very little	Not at all
Both	<b>Overall, how satisfied</b> are you with your experience at the [service location]?	Very satisfied	Somewhat satisfied	Neither satisfied nor unsatisfied	Somewhat unsatisfied	Very unsatisfied
Both	How much <b>do you like</b> the facilities at the [service location]?	A lot	Somewhat	Indifferent	Very little	Not at all

Customer Feedback

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