

Loyalty Survey Tips

Tips for the customer survey:

- An up-to-date customer list is essential
- Use the "80-20 rule" to include the customers that have the greatest impact on your business—unless you are trying to make your results most comparable to the loyalty-leader benchmark results. If this is the case, you should include all customers or a random sample.
- Each customer should receive a personalized letter, on your company's stationary, signed by two key executives
- Include an appropriate incentive to maximize response rate
- The letter should include the following information: why you are conducting the survey, how long the survey will take, the date the surveys should be returned for processing and mention of the incentive
- An internal communication from management should announce your company's plans to survey customers

Tips for the Employee Survey:

- Determine whether it is appropriate to survey all employees, or a random sample
- Replicate all important characteristics of your employee base when selecting an employee sample (e.g. gender, years of service)
- Determine which employee groups are important for analytical purposes; at least 30 completed questionnaires from each group is required for analytical purposes
- Inform all employees of the survey, and why some employees are receiving the questionnaire and others are not
- Get all levels of management on board so that the results have impact and lead to the right actions
- Provide your Executive Committee and/or Board of Directors with an overview of the assessment, and let employees know the project has support from the highest levels in the organization
- Send positive, thorough, open and timely communication to assure employees that the process is confidential and the project is worth the investment of their time and effort
- Maximize response rate by trying the following actions to boost awareness and motivation: set a theme to market the survey, set a specific date for completion, promote it aggressively, give employees incentives to participate and share the survey results with them.