

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

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 measurable 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

Comparison of Some Free Web Survey Tools

Free Versions	Survey Monkey/ Zoomerang	QuestionPro	kwiksveys
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 2 = Male
RACE	Race		-	numeric	1	1 = Caucasian 2 = African American 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?

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