

Top tips: How and why to conduct customer surveys during COVID-19

During the COVID-19 crisis many organisations have understandably been reluctant to run customer satisfaction surveys or research. Completing a satisfaction survey is probably not the priority for most customers at this time.

By pressing ahead with a survey, organisations worry about appearing to be insensitive or out of touch. Or, if organisations have been unable to maintain accustomed service levels as a consequence of COVID-19, there is a concern that customer feedback only reflects the current context rather than the organisation's broader service performance. However, as it becomes increasingly clear that measures to combat COVID-19 are likely to evolve but will be with us for some time, organisations need to recalibrate how they will gather and act on customer feedback.



We believe there are compelling reasons for organisations to continue to engage with their customers to get feedback about service, provided that this is done appropriately. In this guide, we set out the case for continuing to seek customer feedback during COVID-19 and key factors to consider when conducting customer research.

Why do customer surveys during COVID-19?

1) Understand your customers' immediate and evolving needs

Many customers – both consumers and businesses – have been significantly impacted by the COVID-19 crisis. Individuals may be experiencing a drastic change in their financial situation, employment status or domestic arrangements. Some people may be at risk or suffering from physical or mental health conditions, or have responsibility for caring for others who are unwell or vulnerable. Customers' needs and priorities when dealing with organisations may have changed significantly and evolve quickly as circumstances change. Finding appropriate ways of understanding your customers' needs and priorities will be essential in shaping an effective service response to the evolving environment.

2) Check that customers know how to access your service and available help

Your organisation may have had to make changes to the way it delivers service to cope with a reduced number of employees, maintain social distancing or protect the health of employees and customers. As a result, you may have communicated with customers to advise them about the best way to contact you and access help and support. Do customers know how to interact with you and how to access help? How effective have your communications been? You may need to engage directly with your customers to find out.

3) Have you prioritised the right things?

You may have had to reprioritise activity in your organisation in order to maintain essential services, protect customers and employees and manage your financial situation. Have you prioritised the right things from the perspective of your customers? Is there anything else you could do to help your customers during the COVID-19 crisis? Giving your customers a voice by asking for direct and straightforward feedback will help inform your decision-making, enable you to make changes when necessary and may even open up new opportunities that enhance your service and reputation.



4) Maintain your engagement and relationship with customers

Many customers may be feeling isolated or anxious. They may be highly reliant on your service or they may need specific help and support from you. A customer survey is an opportunity to show that you are listening, that you value your customers' feedback and to invite customers to raise their concerns with you. Provided it is communicated appropriately, your survey may also be an opportunity to raise awareness about what your organisation is doing to support customers, employees and the wider community and to gauge customers' awareness of your activity.

5) Help you plan for the immediate and medium-term in a volatile environment

Research with customers will help you assess what your customers need and expect, how well your organisation is performing, and where you need to improve or develop your service. During this time of uncertainty and disruption, customer needs, expectations and behavior are likely to change in unpredictable ways. This means that organisations will need to find flexible, regular and reliable ways of measuring their customer service performance and gaining insight to inform future planning and decision-making.

Key factors to consider when you conduct customer surveys during COVID-19

1) Be clear about the purpose of your survey and why you are getting in touch now

It always encourages customers to respond if you say why you are conducting the survey and how you will use the output. During the COVID-19 it is especially important to tell customers why you are making contact with them and how you will use their feedback.

Ask yourself, why you are asking for customers' attention at this time? If the way you deliver your service has changed or has been limited because of the COVID-19 crisis, or you have requested customers to interact you through particular channels, the survey is an opportunity to assess how well arrangements are working from the customer's perspective.

Given that customer needs, expectations and behaviors may be changing in unpredictable ways, a survey is your opportunity to ask customers what is most important to them now; and what support and help they need from you.

2) Use an appropriate tone and language

Make sure the tone of your survey invite is direct, straightforward and respectful. Avoid sounding either too corporate or overfamiliar. Remember that you do not know the personal circumstances of survey recipients. Consider also that they may have received a raft of communications from organisations seeking to position their response to the COVID-19 crisis.

If your organisation provides essential services, a survey is an opportunity to assess how your service is performing from your customers' perspective, especially if you have had to make changes to the way service is delivered or experienced by customers.

If your organisation provides discretionary services that might not be deemed essential in the current climate, you should consider how you acknowledge this in your communication. For example, you could recognise that completing a survey is probably not a priority but that you will be using customer feedback to focus on the things that are most important for customers, now and in the future.

3) Include questions that are relevant to the moment

Make the survey relevant and appropriate to the moment by asking customers how well your organisation is serving them during the COVID-19 crisis. You could also ask customers about their most important current priorities, what support and help they need from you and what else they believe your organisation should be doing to support customers, employees and the wider community.

If you run a regular relationship tracker survey, consider modifying certain questions to ensure that they are sensitive and relevant to the

current context, or add specific questions that focus on current needs.

If your survey contains questions about products, services or channels that your organisation is not currently able to offer, consider removing the questions, or at least clarifying what you currently offer and what specifically you are asking customers to give feedback about.

If appropriate, ask your customers about the extent to which they have been financially impacted by the COVID-10 crisis. Understanding a customer's current circumstances may add valuable context to their responses.



4) Check your customer data

Be aware that your customer data might include people who are ill, distressed, vulnerable or may even have died in the past few weeks. Check that your data is accurate, up to date and reflects your current customer base. Make sure you have robust processes to update your customer records promptly. Consider whether there are customers to whom it is not appropriate to send a survey at this time and make sure you have a way of identifying or flagging them in your data.

5) Run a pilot survey before a full launch

In general, we have found that response rates to surveys have not significantly changed during the COVID-19 crisis. However, response rates may be sensitive to the evolving situation. It is also possible that in the case of some sectors or organisations, customers may be more or less disposed to respond than they might have been previously. As a result, it is prudent to run a pilot survey with a small representative sample of your customers to assess response rates and the viability of a full survey launch.



6) Review the length of your survey

It's always good practice to make sure surveys are not too long, so that they maintain the respondents' attention and don't result in people quitting the survey before completing it. During the COVID-19 crisis, it's especially important that survey questions are relevant and appropriate. On the other hand, you won't necessarily know whether certain attributes of customer experience have become more or less critical to customers. It may therefore be advisable to maintain a range of questions covering all key dimensions of the customer experience.

7) Interpret survey results in context

Your customer satisfaction results may be affected by the extraordinary circumstances of the COVID-19 crisis. Your organisation may have had to change or limit the range of services it offers, or introduced measures which change the way customers interact with you. Many customers will understand and accept the pressures and constraints faced by organisations. But customers' views may change over time or be influenced by issues of high personal importance. If customer satisfaction with your organisation has improved, or fallen, compared to a survey conducted prior to the COVID-19 crisis, how will you determine the extent to which this is due to customers' experiences during the lockdown period or their broader views about your service performance?

You could potentially address this in the following ways:

- By asking customers about the extent to which they have personally been impacted by COVID-19 and use this insight to help interpret your survey results
- By directly asking customers about how well they believe you have maintained service levels during the crisis

8) Take appropriate action based on survey feedback

Given the uncertainty of the current climate, you will need to consider carefully how you act on customer feedback: not overreacting to unexpected or unclear results, but being sure to identify urgent customer priorities.

If a large number of responses suggest a key aspect of your service is not working effectively or customers express an urgent need, you will need to seriously consider taking prompt action.

If some key metrics have changed unexpectedly, you may wish to check against other sources or gather further specific insight before taking action, such as feedback from employees, external market data or focused research or surveys with customers.

We hope these top tip are useful and we'd love to hear your feedback. Should you have any questions you would like to ask us on this topic, or for more information about conducting customer surveys please get in touch at: enquiries@icsmail.co.uk