

What Are They Thinking? Just Ask

Leveraging the Web for Customer and Employee Satisfaction Research

■ Web-based surveys can help catapult CRM and B2E initiatives to new heights by providing the vehicle to quickly gather the strategic intelligence necessary to make better decisions.

The adage “knowledge is power” has never been more true than in today’s information age. To harness that power effectively, enterprises need efficient ways to obtain and analyze strategic intelligence in ever-shorter time frames. For years, market research firms, human resource departments, and customer relations professionals relied on paper-based surveys and telephone interviews to obtain data. While the data produced was valuable, the process used to collect it was cumbersome, expensive, and inefficient. Today, enterprises of all makes and sizes are turning to the Web to collect feedback from employees, customers, prospects, partners, and other key audiences so they can make better informed business decisions.

Eastman Chemical Company in Kingsport, Tennessee, for example, is a global supplier of custom-manufactured fine chemicals for pharmaceuticals, agriculture, and other markets. Sales revenue for 2001 was \$5.4 billion. Eastman’s customer excellence initiatives have long included the use of surveys as a vehicle for obtaining customer feedback.

Likewise, executives at Cleveland, Ohio-based KeyCorp, a bank-based financial services company, know

that optimizing employee satisfaction is key to the success of this Fortune 500 company. KeyCorp uses surveys as part of its business-to-employee (B2E) strategy to gauge the effectiveness of its training and benefits programs among a workforce of almost 22,000 employees across 45 states.

Although the target audiences were different, Eastman and KeyCorp embraced Web survey solutions as the vehicle to gather the data needed to make better business decisions. By using Web-based survey tools, both companies were able to rapidly acquire customer and employee feedback critical in identifying issues, concerns, and trends. Armed with this information, they can take necessary actions to implement tactical and strategic solutions to maintain and grow their customer base, reduce attrition, and increase employee retention.

Why Go Web?

Like many companies, Eastman relied on a one-size-fits-all paper survey to solicit feedback from its customers. With the explosion of the Internet, Eastman quickly recognized the speed and power of the Web for global survey administration. In 2000, the company migrated to a Web-based

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survey solution, but found the software too inflexible to meet its needs.

“While we were pleased that we no longer needed to enter data from paper-based surveys manually, we found that the software wasn’t as easy to use as we would have liked,” said Lynn Peterson, Eastman’s online development specialist of customer satisfaction and market research. “It also was rather restrictive; we weren’t always able to get the look and feel we wanted. And because our customer base is quite diverse, we needed a software solution that provided greater flexibility in terms of the questions we wanted to ask.”

Convinced that Web surveys were still the right tool, Peterson began a search for an alternate Web-based solution that would enable her to create online surveys for individual business units that could be customized for each unique customer set.

And although KeyCorp’s market research team had conducted paper-based employee surveys for years, the time they spent pursuing non-returned surveys and manually entering the data was becoming increasingly unmanageable. “With our widely spread employee base, we needed a fast,

easy-to-use, and security-rich solution that fully leverages the Web,” said Kelly Preisel, KeyCorp’s market research analyst. The right tool also would make the tasks of collecting, managing, and assessing the employee feedback manageable without requiring substantial additional resources. Coincidentally, in 2000, the market research team also began searching for a Web survey solution that would optimize their efforts to obtain valuable feedback from a widely dispersed employee population.

Today’s Web survey applications are designed for the non-technical business user and make it easy for small to large organizations to take advantage of the technology and to transform CRM and B2E initiatives from catchy buzzwords into practical, cost-effective realities. With minimal expertise, virtually anyone in an organization can create professional-looking surveys quickly and easily from the desktop.

Another obvious benefit to using the Internet is significant cost reduction. Web survey technology eliminates the production and mailing costs associated with conventional paper surveys. The availability of easy-to-use Web solutions means that customized surveys can be created

and administered more frequently. Research has shown that because Web surveys are easier to complete, response rates are significantly higher, resulting in increased data accuracy. Survey responses also can be validated during the completion process, minimizing data entry errors. And because survey results are automatically collected, they are available for immediate analysis.

Online survey administration, which allows users to administer surveys through a common Web browser, is another Web-enabled capability that delivers concrete benefits. With this functionality, users can perform a range of administrative tasks, including activating and deactivating surveys, setting response limits and cut-off dates, purging surveys, viewing reports, and publishing results on the Web. Users also can access and distribute reports to multiple appropriate audiences or export data to popular reporting tools, such as Microsoft Excel and SPSS. The productivity increase that comes through online administration enables market research and CRM professionals to leverage their limited time more effectively than ever.

Selecting the Right Tool for the Job

Awareness of the benefits that can be derived by a survey initiative based on Web technology is just the first step. Eastman's Peterson and KeyCorp's Preisel had clear objectives in mind when shopping for their survey solution. Faced with an array of survey tools in an expanding market, how does an enterprise make the optimum choice for its needs? Based upon input gathered from executives across the country, the following are some of the key features that should be evaluated when selecting the most

appropriate solution:

- **Installation options.** Survey tools can be installed either as a hosted ASP solution through a third-party Web site or as a product directly installed on a customer's server. The installed option allows the client to exert maximum control over IT performance and to custom configure based on their security requirements. An ASP option generally speeds implementation, minimizes the up-front ownership costs, and can overcome a potential lack of IT staff and infrastructure.
- **Ease of use.** Not surprisingly, a tool that requires substantial expertise quickly will become shelfware. A tool that is installed easily and requires little or no training will be adopted and used more easily. The best Web survey solutions are designed for non-technical users and are as easy to use as standard office applications. The key to their success is that virtually anyone can create, deploy, and manage a survey. This is equally attractive to small and large businesses, because it minimizes IT resource requirements and simplifies survey administration.
- **Survey appearance.** A great-looking survey invites more responses than one that looks unprofessional or is too time-consuming to complete. And more responses improve the accuracy and the resulting value of the data. Offering the user a "what you see is what you get" functionality proves to be beneficial to users. They can begin literally with a blank slate and customize the exact look of their surveys to match their corporate identity and existing collateral by adding complementary backgrounds, images, and HTML templates. Whether a user opts to start from scratch or to take advantage of provided templates, Web survey applications produce professional-looking surveys at minimal cost.

- **Question design and planning.** Question design and planning remains one of the most challenging aspects of survey research. Web-based survey solutions offer a variety of features that help users with question design. Multiscale questions allow users to design survey questions that can measure several related factors simultaneously. A traditional dual-scale question might measure, for example, the satisfaction rating a respondent gives a company's help desk as well as the importance the respondent personally assigns to help-desk support.

Question "text piping" dynamically inserts the answer from one question into the text of a following question. This feature allows users to personalize the survey for their respondents. A survey's first question, for example, might be, "What is your favorite type of fast food?" If the respondent picks "french fries" from the list of available answers, the next question could ask, "How often do you eat *french fries*?"

Answer randomization allows users to improve the validity of surveys by removing the statistical tendency of respondents to select some answers more often than others based on their positions within the list of available answers.

- **Automated guidance.** Sample question-and-answer scales can be selected from tool libraries, or users can create their own questions and archive them for use in future surveys. And the optional use of survey "wizards" (automated shortcuts) provides step-by-step guidance for the non-technical user. After guiding the user through a few questions, survey publication wizards can make the distribution process as simple as a mouse click. Once a survey is ready, it's easily deployed to the Internet.

• **Invitation management.** Once target participants are identified, each person receives an e-mail invitation to complete the survey. The process of invitation management includes loading e-mail addresses into the survey tool, distributing the surveys at specified times, tracking responses, and sending e-mail reminders.

• **Analysis and reporting.** One of the greatest advantages of Web surveys is the ability to analyze and report survey results immediately. Online reports typically include counts and percents, descriptive statistics, ranking summaries, pie graphs, bar charts, and text responses. Reports can be viewed online or published to the Web. In addition to viewing survey responses in a browser, an advanced survey tool will easily export data to Microsoft Word, Microsoft Excel, Adobe Acrobat, and SPSS formats.

• **Scalability.** When evaluating a Web-based survey solution, the savvy manager considers both the current and future needs of the organization. Tools designed to support an unlimited number of surveys and respondents are more appropriate for a growing company or a larger organization surveying across a global corporate enterprise.

• **Security.** A feature such as “respondent authentication” allows only designated respondents to take a survey and precludes their responses from being collected more than once, without identifying questions. From an IT perspective, users can control access to administrative functions, reports, and data through passwords. Security lockout features can be used to disable access after a failed number of attempts, like using an incorrect password, for example.

A few Web survey tools offer security features to protect the integrity

of the data, such as use of the Secure Socket Layer (SSL)—meaning that all communications with the surveys and the administrative site can be encrypted to protect the information as it travels over the Internet. Stored survey responses also can be encrypted to protect the data from unauthorized access.

Return on Investment

In 2001, Eastman’s Peterson deployed some 30 custom Web surveys to audiences ranging in size from 100 to 2,000 respondents. That total rocketed to about 95 in 2002. In addition to obtaining the mission-critical information her company needs to thrive, Peterson says the Web survey tool has done much to significantly reduce people hours and resource requirements for survey administration. Eastman executives use the business intelligence gleaned from surveys to validate customer requirements, construct strategy for future products, and enhance customer excellence initiatives.

KeyCorp’s Preisel says their Web survey tool has enabled her team to significantly increase the number of employee surveys administered. Since their solution’s implementation in early 2001, KeyCorp has nearly doubled the number of internal surveys it conducts, without significant staffing increases. In 2000, just prior to the solution’s implementation, KeyCorp’s market research deployed 70 surveys. In 2001, that number grew to 100, and 120 surveys were completed through October 2002. Although the number of survey projects continues to rise, only one additional analyst has joined KeyCorp’s staff of four research project managers since the implementation. Preisel also appreciates the solution’s data-collection and reporting features. Instead of

spending two or more weeks entering data from large-scale paper surveys, she now views reports online instantaneously and downloads them for analysis by her team.

And the Survey Says...

Thanks to today’s Web survey applications, organizations can deploy great-looking custom surveys without placing an extra burden on their IT departments and without hiring costly market research firms. KeyCorp’s strategy is representative of a definite trend among large enterprises to leverage Web technologies proactively to create a favorable environment for their employees. To maintain its competitive edge, Eastman’s market research team routinely uses Web-based surveys to measure customer satisfaction as part of its overall CRM strategy. Both enterprises have experienced payoff from implementing Web survey solutions.

The foundation of many successful CRM and B2E strategies, Web-based surveys can help catapult CRM and B2E initiatives to new heights by providing the vehicle to quickly gather the strategic intelligence necessary to make better decisions. The obvious return on investment includes cost and people savings in terms of survey administration, but even more important, valuable and timelier information that can be used to optimize customer and employee satisfaction, which directly impacts the bottom line. ♦

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