

# Customer Surveying Alternatives

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## Introduction

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The more progressive and customer-centric call centers are now reaching beyond getting occasional measures of customer satisfaction (Csat) and first call resolution (FCR) customer survey data. They are now depending on a continual stream of customer survey data that allows them to drive accountability for Csat and FCR down to the Customer Service Representative (CSR) level. Also, the continual stream of customer survey data is being used to identify customers who are dissatisfied with their call center experience and who are at risk of going to the organization's competition. One of the most common questions we get asked from companies that are trying to be more customer-centric is how to survey customers more frequently (typically 5-10 surveys per CSR per month) in a cost effective manner and how to use the survey process to help them retain customers. It is SQM's experience that the two best methods for conducting customer surveys that are cost effective, create accountability at the CSR level and can help retain customers are an outbound IVR survey or a hybrid IVR survey.

## Outbound IVR Survey

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The outbound IVR survey method uses a predictive dialer to call customers within 5-10 minutes of them completing their call to the call center. The survey is fully automated, it has 12 to 15 questions and takes approximately 3 to 4 minutes to complete. The customer can provide feedback both positive and negative as well as provide reasons on why their call was not resolved. In addition, the outbound IVR survey allows you to set consistent quotas at the CSR level. It is also SQM's experience that the outbound IVR survey method is much more accurate for Csat and FCR ratings than the traditional inbound IVR survey method. The main reason why the outbound IVR survey is more accurate is because at the end of the call in the inbound IVR survey process the CSR has to hang up first, thereby releasing the customer into the IVR survey. So if the CSR thinks the customer will rate them poorly the CSR will wait the customer out at the end of the call, forcing the customer to hang up first thereby not allowing the customer to participate in the IVR survey. This inbound IVR survey practice results in positively skewed Csat and FCR ratings by as much as 50%. This positive skew (inaccuracy) is the most common reason why companies decide to stop using the inbound IVR survey method. The outbound IVR survey method requires that the survey organization receives dialer files every 5 to 10 minutes, 7 days a week for approximately 12 hours a day so you can do frequent surveying. One of the major benefits of this frequent surveying process is having hourly reporting for your Csat and FCR performance. The outbound IVR survey process requires a substantial capital investment however, for large call centers the outbound IVR survey process is the best alternative for providing a continual stream of customer data in a cost effective manner.

## Hybrid (live/IVR) Survey

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The hybrid (live/IVR) survey method uses a predictive dialer to call customers within 1 to 3 days of their call to the call center. The call to the customer starts with a live telephone survey representative (TSR) inviting the customer to do an automated IVR survey. If the customer agrees to participate in the survey, the TSR transfers the customer into the fully automated IVR survey process. The hybrid (live/IVR) survey process also has 12 to 15 questions and takes approximately 3 to 4 minutes to complete. The customer can provide feedback both positive and negative as well as provide reasons on why their call was not resolved. In addition, the hybrid (live/IVR) survey process allows you to set consistent quotas at the CSR level. The hybrid (live/IVR) survey process is a viable option for companies that can not send customer dialer files every 5 to 10 minutes. Typically companies that use the hybrid (live/IVR) survey process send customer dialer files once every day. When the files are received only on a daily basis, you can only do daily reporting versus hourly reporting that you can do in the outbound IVR survey process. It has been SQM's experience that there is no difference in customers willingness to participate in a Hybrid (live/IVR) survey versus the traditional live survey. The main reasons why participation rates for hybrid (live/IVR) survey and the traditional live survey are the same is because in the hybrid (live/IVR) survey process a TSR finds the right customer to be surveyed, educates the customer on the automated IVR survey process and the automated IVR survey portion is only 3 minutes in length. The hybrid (live/IVR) survey process requires very little capital investment. Because there is only a small capital requirement, the hybrid (live/IVR) survey process is the most viable option for most call centers that want to provide a continual stream of customer data in a cost effective manner.

## About SQM

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Since 1996, Service Quality Measurement (SQM) group has been a leading North American contact channel Voice of the Customer (VoC) research firm expert for improving organizations' first contact resolution (FCR), operating costs, employee and customer satisfaction. We have done this by being operationally excellent at benchmarking, tracking, consulting and recognizing our clients' first contact resolution (FCR), employee (Esat) and customer (Csat) satisfaction performance. Over 70% of our call center tracking clients improve their FCR and operating costs year over year. For the average call center SQM benchmarks, a 1% improvement in their FCR performance equals \$256,000 in annual operational savings. Our research also shows that when you improve your FCR, not only do you achieve operational savings, you also reduce customers at risk which is typically a 5-10 times greater savings opportunity than the operational FCR improvement savings.

**SQM benchmarks over 450 leading international call centers on an annual basis and has been conducting FCR Csats benchmarking studies since 1996.**

On an annual basis, SQM also conducts over 25,000 surveys yearly with employees who work in call centers. Our customer and employee call center survey database is one of the largest in North America. SQM does business in 11 countries around the globe: Canada, United States, Argentina, Australia, Puerto Rico, India, Philippines, Costa Rica, Mexico, Dominican Republic and Jamaica.

**SQM also benchmarks and tracks all the major contact channels (i.e., website, call center, IVR, email and site).** Our site contact channels include branch, retail store, dispatching and service work. By conducting benchmarking and tracking studies on these contact channels, organizations can get insights into customers' experiences using these contact channels individually or using multiple contact channels, to get their inquiry resolved. For all the contact channel benchmarking and tracking studies, SQM focuses on the customer's experience in achieving first contact resolution. SQM conducts over 1 million surveys (over 450,000 live surveys and over 550,000 IVR surveys) with customers who have used a call center, email, website, IVR or site contact channel service.

**SQM's Awards Program is the most prestigious and sought after North American contact channel FCR awards program.** Our awards are based on customers who have used a contact channel and employees who work in a call center. These awards are considered to be the fairest and most credible service quality awards for measuring the customer's experience when using a contact channel because they are based on FCR performance. We have recognized top performing organizations for FCR, Csats and Esats since 1998. SQM evaluates leading North American organizations such as American Express, UPS, FedEx, Marriott, Sears, Canadian Tire, U.S. Bank, Wells Fargo, Rogers, Capital One, CitiFinancial, Scotiabank, Discovercard and Blue Cross.

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**SQM's Certification Program is designed to determine if call centers, supervisors and customer service representatives are performing at the world class call FCR and customer satisfaction performance level.** Our FCR and customer satisfaction certification program is the most credible and rewarding certification program in the call center industry because certification is based on your customers' experience calling your call center. Certification is based on surveying customers who have just recently called a call center.

**SQM offers four different post-contact surveying methods (i.e., phone, IVR, online and SMS mobile).** Our post-contact survey is based on proven survey questions that provide accurate results and clear insights on areas to improve. SQM conducts all phone surveys using our own dedicated workforce. All post-contact survey methods can be integrated into one common database. Our call list management system allows us to accurately deliver a survey quota at a customer representative level or any other survey quota level that is required. To ensure the quality of our survey data and feedback collection, SQM monitors 100% of our surveys. The accuracy of each survey method is individually tracked and must comply with our minimum error rate of less than 1%.

**Our reporting is available in real time via our secure mySQM web portal or through your mobile phone.** Customer representatives and supervisors have direct and secure access to their reports and coaching logs. Your analysts have full access to over 60 FCR Csats pre-formatted reports which can be easily exported. Furthermore, your analysts can sort and search the data for ad hoc reporting. Our reporting capabilities also allow the integration of Csats survey and call quality assurance evaluation data. Raw data is also available in real time.

**We have two state-of-the-art research call centers located in Coeur D'Alene, Idaho and Vernon, British Columbia, to conduct professional customer surveys with customers who used a contact channel.** SQM is recognized as a leading contact channel research firm VoC expert for analyzing FCR, Csats, and customer experience performance. Our research analyst professionals have strong mathematical academic backgrounds. They also understand contact channels and stay current with the best practices for capturing, analyzing and reporting VoC data and feedback. Specifically, SQM research analysts use VoC metrics such as FCR, Csats and the Customer Protection - CP SCORE™ to truly understand how your contact channel impacts the customer service experience, operating costs and the ability of your contact channel to retain customers.

**Call Center Outsourcing Service.** SQM offers the capability of handling inbound call center outsourcing service to help organizations in providing a world class first call resolution and customer satisfaction performance. SQM's call center expertise with inbound call center solutions drives world class customer service results. By leveraging SQM's extensive call center industry experience and leading edge technology, your organization will be investing in providing your customer's world class service through SQM's call center outsourcing service.

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