

# Best Practices

## Overcoming Resistance To Your Survey Program

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**D**o these statements sound familiar? “It’s not valid!” “It’s not actionable!” “It’s not working!” If you’ve ever rolled out a customer satisfaction survey program, you’ve probably heard these complaints before. However popular it may have appeared in the planning stages, after the program has been deployed for awhile - and managers are held accountable for the results - pushback is inevitable.

Having witnessed many such deployments, we have noticed that managerial resistance nearly always comes in three stages.

After the initial, rosy period in which everyone agrees that it’s a great idea to survey customers and raise the bar on satisfaction and loyalty, the harsh reality becomes clear: Not everyone is going to look good when the results are posted. If there are incentives involved, some people are going to be rewarded less than others. Moving the needle is hard.

Suddenly the picture isn’t so rosy. Which leads to the Three Stages of Pushback.

The first stage is called, *It’s Not Valid*. You know you’ve reached it when you hear things like:

“You’re asking the wrong customers.”

“You need to survey more people.”

“These numbers don’t add up.”

Any error or ambiguity is fair game to seize upon and hold up as evidence that the entire program is invalid. But of course the question of validity is just a diversion. The real issue is that no one wants to risk getting bad news. This is a perfectly rational and understandable concern. Managers have a significant amount of complexity to deal with already. Who needs another headache?

Nevertheless, if you want your program to succeed over the long-term, you will need to prepare for a determined assault on its validity. That means having all your facts ready, and being fully prepared to explain and justify your design decisions regarding sampling, methodology, question content, etc. It helps to prepare a fact sheet that anticipates any concerns you may get from managers. You may even want to hold “mock debates” with your team to make sure you are fully prepared to answer challenges from the field.

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But that’s just stage one. If you get past the validity test, you will move quickly to stage two: *It’s Not Actionable*. You know you’re there when you hear:

“These questions are too general.”

“These things aren’t in my control.”

“What am I supposed to do with this rating?”

All legitimate concerns. Voice of the Customer survey programs are sometimes expected to provide a recipe for cooking up a perfect dish of customer loyalty. A pinch of this, a dash of that and scores go up. In reality, what the

recipe actually says is, “Season to taste.” In the absence of precise instructions on what to do with the survey results, managers may feel that they have been set up for failure.

The answer is not to redesign the survey with dozens of new questions, but to make sure that the program includes options and information that effectively guide managerial action. Training, best practice tips, FAQs, coaching guides and other support should be part of the overall program from the beginning. In addition, the survey should supply as many customer comments as possible in order to give life and context to the ratings.

But even if you take these steps, there’s still one stage to go: *It’s Not Working*. The sign that you’ve reached it is when you hear:

“My scores are up, but my profit is flat.”

“Why don’t the stores with the highest satisfaction have the best sales figures?”

“We can get better ROI doing something else.”

Many promising customer experience initiatives have fizzled when they were unable to produce convincing financial results. But if you haven’t designed the program from the beginning to link to financial and operational metrics, it may be very difficult to do so later on. It’s a good idea to identify, *during the design phase*, the specific business outcomes you want to improve. Do you think you’ll increase customer retention? Decrease complaints? Increase referrals and new business? Then you will need to have good measures in place that you can track against your survey scores from day one. Otherwise you will be chasing data and trying to link it up for years to come.

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The most important point to remember is: Plan ahead. The Three Stages of Pushback are predictable and inevitable, but if you’re prepared for them you can move through each stage more quickly, and your survey program will be much more likely to succeed.

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