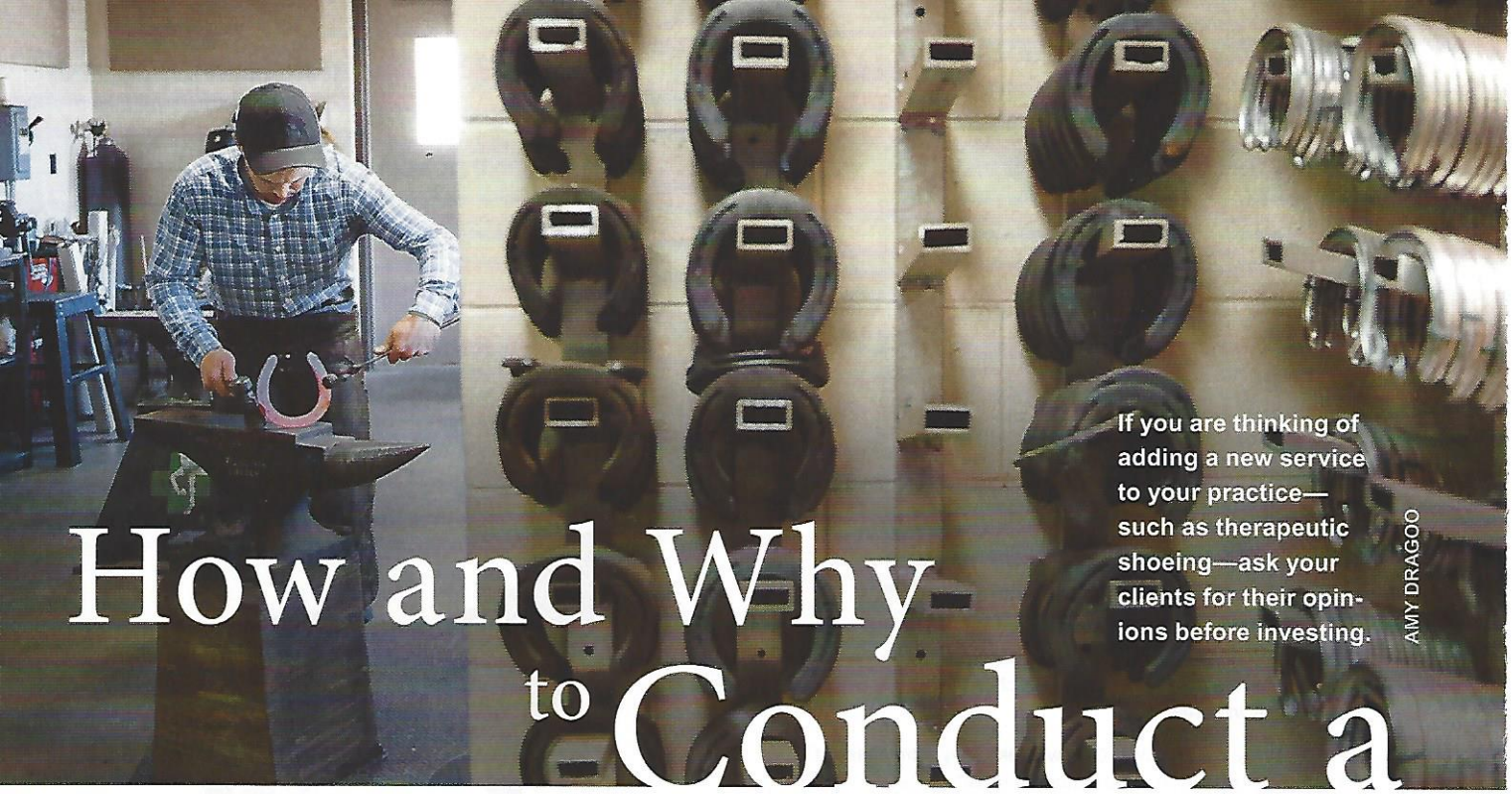


If you are thinking of adding a new service to your practice—such as therapeutic shoeing—ask your clients for their opinions before investing.

AMY DRAGOO

How and Why to Conduct a Client Survey

Since customers determine the success of any business, it's important to keep tabs on what they're thinking.

By Katie Navarra

Since neither scientists nor technology developers have figured out how to read an individual's mind, the only way to know whether customers are happy with your services is to ask them.

Satisfaction surveys are one tool you can use to learn what your customers think of your services and discover opportunities to grow your business.

Client surveys are simply a part of doing business. Look at the bottom of the last receipt you received after a purchase at the store, and it will probably have a survey link to which you can go and give your opinion. Whether you want to find out how clients feel about your business and services in general or you are curious about whether customers would be willing to pay for a specific new service, a survey can help you find out quickly.

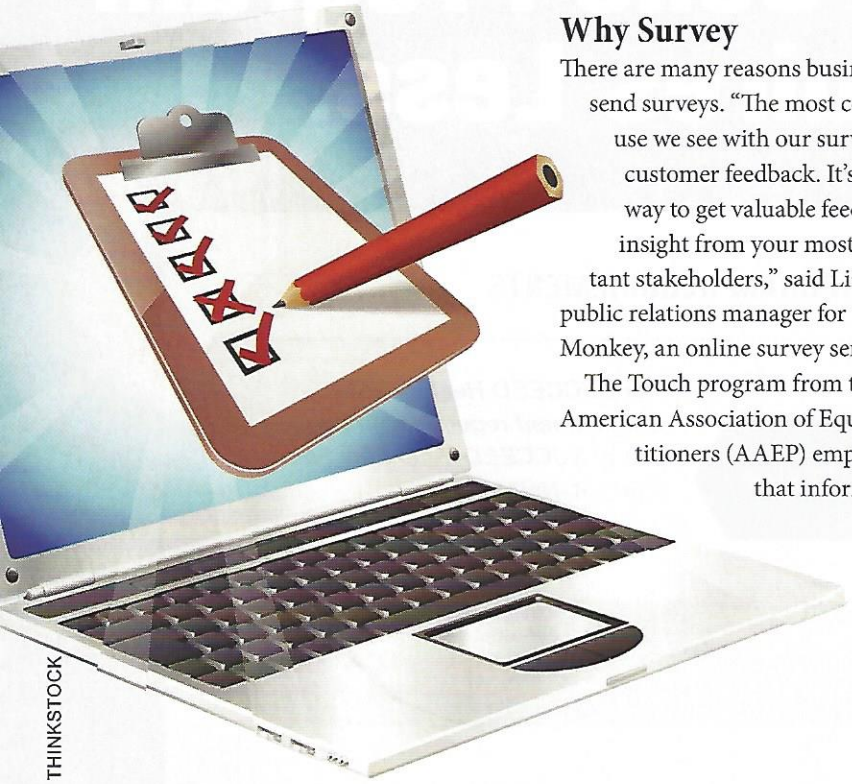
In the Field

In 2013, Gary Hanes, DVM, owner of Briarwood Equine Clinic in Woodside, California, knew he needed feedback from his clients. His practice was undergoing two significant changes, and he wanted to make sure he was aware of how those changes impacted customers.

First, his office manager was moving on, and he had decided not to fill the position. Instead, he transitioned to an automated telephone service. Second, he was simultaneously deploying new management software that would give him access to client records while on farm calls. The software would also allow him to send customers their appointment reminders and billing information electronically, and it could be programmed to meet the specific needs of individual clients with regard to communication preferences. "Ultimately, I wanted to know if my clients were happy with the service they were receiving and how they perceived these changes," he said.

He distributed 300 surveys, mostly via email, with some via paper mail, and received 108 responses. His response rate of one-third was well above the 10-15% response rate that most surveys yield. Overall, the feedback was positive, and he also had comments to consider for things he could change.

"The survey served its purpose and it provided useful information," he said.



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Why Survey

There are many reasons businesses send surveys. "The most common use we see with our surveys is customer feedback. It's a quick way to get valuable feedback and insight from your most important stakeholders," said Liz Leismer, public relations manager for SurveyMonkey, an online survey service.

The Touch program from the American Association of Equine Practitioners (AAEP) emphasizes that information gained from a client survey can be used to influence changes made to services offered, practice procedures and processes. The results can also help shape marketing efforts and position your practice for the future.

In addition, survey results can confirm an observed trend or changing customer preferences. "I've noticed there are some clients that I am seeing less or not at all," Hanes explained. "Another survey may help me better understand why clients have not called."

Although you might be skeptical about whether or not clients are willing to respond, Leismer believes that many people (customers) want to share feedback with the companies and brands with which they engage.

Online tools such as SurveyMonkey offer low-cost, sometimes free, software for conducting surveys. Surveys created in-house, although cost effective, require staff to draft and conduct them. This time will factor into how often you're able to survey your client base. Depending on the size of your practice and the level of detail for which you're looking, it is possible to hire an outside polling company.

"We believe people should survey their clients early and often," Leismer said. "People tend to provide the most thoughtful feedback immediately after the event they're surveyed about, whether it's a customer transaction, a product they used or an event they attended."

By frequently surveying customers, you're able to develop a benchmark over time. How has your customer feedback evolved? Is it trending upward or downward? If the latter, what changed?

Regular surveys can provide valuable insight, but be cautious. Conducting a survey simply for the sake of surveying can reduce response rates, irritate customers and burden staff.

Survey Design

Most often, surveys are conducted online or via "snail" mail. The survey design as it

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relates to the total number of questions asked, the phrasing of the questions and usability is similar for either model.

There's no golden rule for how many questions a survey should include. "Think of yourself as a survey taker, and the amount of time you would be willing to spend answering questions," Hanes suggested.

"Recently we evaluated two years' worth of data from SurveyMonkey surveys sent, and found that 12 is the median number of questions on surveys," Leismer said.

The longer your survey, the more likely your respondents will get tired or lazy with their answers, or—the worst-case scenario—they drop out of your survey altogether. Longer surveys have lower completion rates, which mean they have higher non-response bias, which is something you want to avoid.

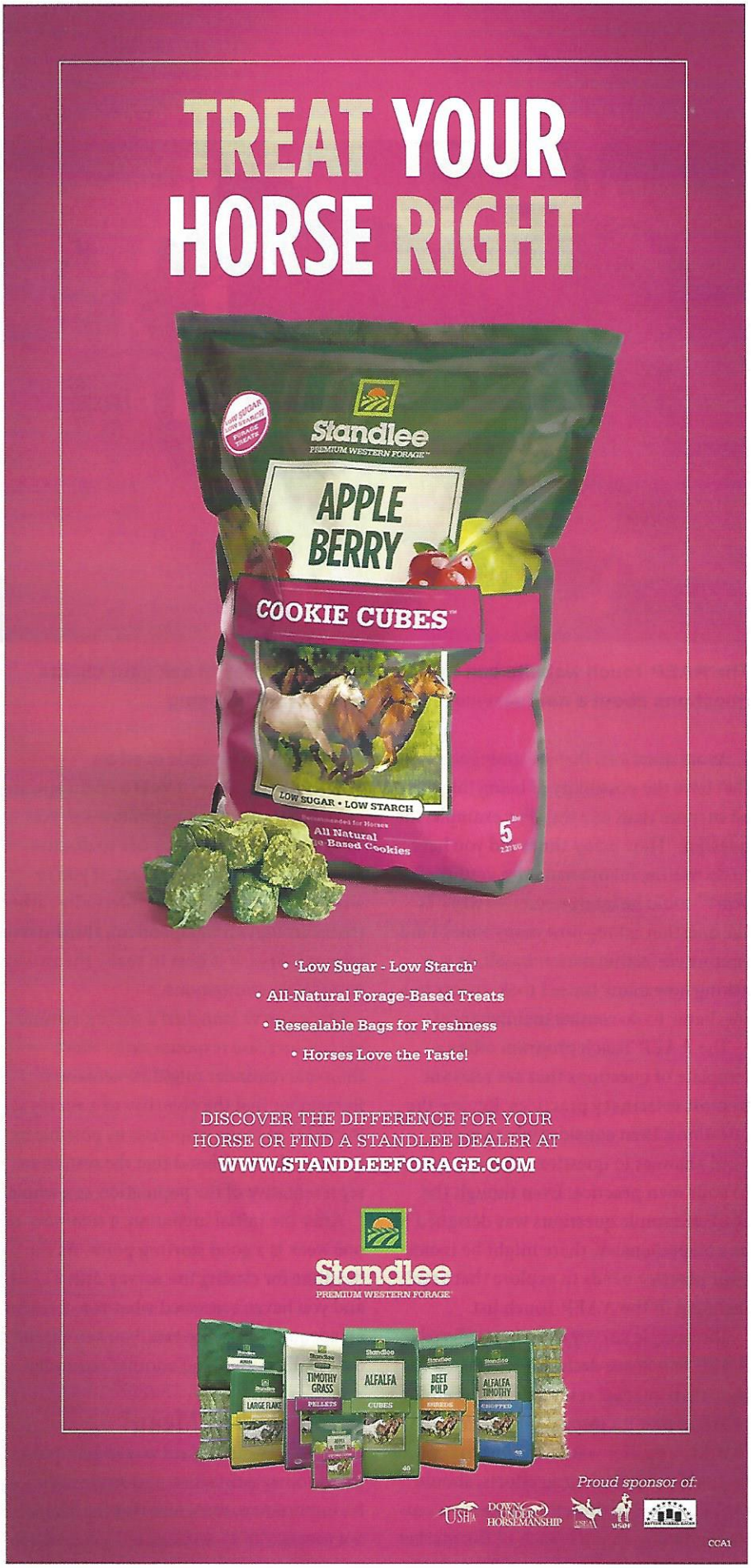
When it comes to phrasing survey questions, first ask yourself, "Will this question yield information that truly helps me understand what I want to know?"

For example, if you are considering hosting educational seminars and want to know whether clients would attend, you might ask, "How many times do you go to training in a typical year?"

If the responses you allow an individual to select are "never," "occasionally," "sometimes," and "often," you'll have a hard time figuring out what to do with this information. What does "occasionally" actually mean? Do your respondents have different ideas of what it means? Without some kind of operational definition of what each answer choice means, the results are practically useless.

Questions of this nature might be more effective when a respondent is asked to choose from a defined list such as 0; 1-3; 4-6; 7+.

Questions can also be phrased in a way that allows for an open-ended response, a "yes"/"no"/"maybe" reply, or a ranked matrix.



AMY DRAGOO

The AAEP Touch website can help you create a survey to ask your clients questions about a new service, such as therapeutic shoeing.

Avoid questions that are ambiguous and that have the possibility of being interpreted in more than one way. For example, the question "How many times did you have to do routine maintenance on your car last year?" could be interpreted two ways. Is the question asking how many times I did routine car maintenance myself, or is it asking how many times I took my car to a mechanic to do routine maintenance?

The AAEP Touch program offers a template of questions that are relevant to most veterinary practices. Review the questions, then consider whether you need answers to questions that are specific to your own practice. Even though the bank of sample questions was designed to be comprehensive, there might be issues your practice needs to explore that aren't included in the AAEP Touch list.

The sample survey questions offered by AAEP Touch are designed to be used for legitimate market research. AAEP emphasizes that it's important to remember that such studies, while an important tool to guide your marketing efforts, should never be used to directly market to a customer. Doing so is a breach of the market research industry code of ethics.

At the same time, unless a client specifically requests a personal follow-up, you shouldn't contact him or her to discuss answers to the survey. In fact, if you're administering the survey internally rather than through an independent, third-party research firm, it is best to make the survey completely anonymous.

Once you've launched a survey, reminders can increase response rates. More than one reminder might be necessary. Remember that the objective of a survey is to collect as many responses as possible to increase the likelihood that the results are representative of the population as a whole.

After the initial invitation, a reminder in one week is a good starting point. As the deadline for closing the survey draws closer and you haven't received what you consider an adequate response rate, you can extend the deadline and send another reminder.

What Does It Mean?

Client surveys are a good way to get a pulse on customer satisfaction and sentiments. It's important to recognize that the data is not necessarily an accurate reflection of how every single client feels (unless they all respond), but a well-conducted survey should be largely representative of your entire group.

"Surveys have their weaknesses, and I wanted to acknowledge that perhaps it was only the really happy customers who responded," Hanes said. "But the results indicated overall that customers are pleased with the service they are receiving. And I learned a few changes that I needed to make."

It can also be tempting to only consider the "negative" comments or the suggestions for changes. Wholesale changes based on one or two comments might not be good for business. Any changes have to be aligned with your larger goals and your larger client base.

For example, one of Hanes' survey respondents said he wished that Hanes saw cats and dogs in addition to horses. For him, adding that service simply to make one customer happy didn't make good business sense.

However, "When you send out a survey in the spirit of humbleness and with the intention of learning how you can service your clients better, the results will be worth the efforts," Hanes concluded.

Take-Home Message

Conducting a survey of your clients for a specific reason can give you solid information that you can use to help make business decisions. The AAEP Touch program can help you with standardized questions, but be open to asking things that are specific to your group.

Don't make your survey too long, and bear in mind that most survey respondents want to remain anonymous. Using a free or inexpensive service such as SurveyMonkey.com can help you design and manage a survey in a professional manner. Or you might want to contact a marketing firm in your area to conduct and analyze a survey if you don't feel capable of doing it yourself.

The bottom line is never to assume you know the answers; it's easy to ask your clients to ensure your business is going in the right direction. EM