

WHITEPAPER: Other Ways to Measure Satisfaction

Using multiple lenses and methods to gauge customer satisfaction ensures that your measurement is accurate and complete.

Keywords & Concepts

Customer Satisfaction

Customer Service

Surveys

Feedback Cards

Mystery Shopping

Customer Interviews

Experience Audit

Performance Analysis

Monitoring

Other Ways to Measure Customer Satisfaction

While closed question surveys are by far the most common way to measure customer satisfaction, they are not the only way. Other methods include: interviews, audits, monitoring and performance analysis.

From Inside the Trenches: A Practitioner's Perspective on Other Ways to Measure Customer Satisfaction

Too often customer satisfaction is reduced to a simple equation that compares customer expectations to customer perceptions (E-P = Opportunity).

In fact, there are many contexts and points of view relevant to the discussion of customer satisfaction. For instance, other than E-P, other key facts that inform customer satisfaction are company vs. competitor comparisons, company vs. comparable company comparisons, service execution versus brand promises and service execution versus loyalty goals. Applying a variety of measurement methods to capture these other indicators may be just as important—if not more important—than E-P.

Strategy To Consider

Avoid measuring the entire customer experience in one fell swoop with one "does it all" method. Instead break the customer experience into distinct lenses, touchpoints and customer segments. Along these lines, try to reach customers before, during, and after their interactions with you. Use methods relevant to each lens, touchpoint and segment.

Academic Roundtable

Even if you are committed to measuring current customer perceptions using surveys, you may want to consider complementing your approach with other techniques. Below we

detail some other approaches to measuring customer satisfaction and highlight the pros and cons of each.

Feedback Cards

Anyone who's ever shopped, dined or vacationed has received a feedback card at some point. They're so ubiquitous that companies in almost every industry have them and dish them out like confetti. The primary positive of feedback cards is that **they're cheap and allow customers to vent**. On the other hand, how representative is the sample that fills them out? And does anyone really take the time to read and gather insights from them? They're often so poorly designed—with irrelevant questions and not enough room for true feedback—that they make for a difficult if not impossible measurement tool.

Interviews

Predominantly, interviews seek to explore rather than rate an experience. There are a few different interview styles to choose from; for instance, they can be structured or follow a free-wheeling conversational format. Interviews can be conducted in person or over the phone, or as intercepts with customers as they exit a store. Some usability studies might also be considered interviews, when they involve conversing with customers as they interact with a website or other kinds of materials. In addition, interviews can target prospective, current or defector customers. **What's great about interviews is that they allow you to truly probe the customer experience**. The difficulty with interviews is that they require highly skilled practitioners trained to extract valuable information from customers.

Mystery Shopping

Mystery shopping (also called secret shopping or performance evaluation) comes in a variety of different forms, including phone mystery shopping, email mystery shopping and in-store mystery shopping. All of these formats require a company outsider to act as a customer. The "outsider" then documents his/her experience. What's good about mystery shopping is that it helps **combat the biases that managers and**

supervisors have about their teams. In addition, since employees typically do not show their true colors in front of their superiors, it can be a great way to get the inside scoop on what really goes on when associates interact with customers.

What's bad about mystery shopping is that the mystery is often blown by unskilled shoppers or poorly designed shop scenarios that are easily spotted by employees. Of course this skews the shop results, and can make stores appear to perform better—or worse—than they actually do.

Experience Auditing

Experience auditing is a specialized and rigorous form of mystery shopping that involves the use of personas, scenarios and objectives to document and measure the variety of communication cues exchanged between staff and customers. Unlike mystery shopping, experience auditing **employs qualitative and quantitative techniques and can be used to uncover specific actions that frontline staff can take to increase customer loyalty.** It is applicable in some B2B situations and in nearly all consumer situations, especially for retail and call center-based experiences.

The key advantage of experience auditing (versus mystery shopping) is that **personas and scenarios keep the interactions natural and extract detailed information relative to particular customer objectives.** As with mystery shopping, the disadvantage of experience auditing is that these methods do not lend themselves to statistically valid comparisons or conclusions.

Monitoring

Monitoring can be directed at phone, email, and chat communications, and may also be referred to as quality monitoring or performance evaluation. Often the monitoring process involves automated electronic recording of phone interactions using tools developed by companies like NICE Systems, Verint and other technology providers. **Monitoring gives a real-world glimpse** into interactions between customers and front-line staff. The downside of monitoring is that it usually evaluates performance using generic quality criteria that fail to reveal insights regarding performance opportunities.

Performance Analysis

Like monitoring, performance analysis examines the real-world interactions between companies and customers, but with the use of criteria that has been detailed and vetted for each type of interaction (or transaction) that a company has with its customers. Performance analysis examines root causes, and measures performance against factors such as informational, connection, stylistic and timing cues. While performance analysis generally involves a steeper investment than monitoring, **it forecasts strong and weak areas to determine how much monitoring is needed before reaching the point of diminishing returns.** Because of its thorough vetting process, in time performance analysis may save companies money over a traditional monitoring approach. Furthermore, performance analysis uncovers nuances and provides next step recommendations that can improve performance so that a company is in fact less dependent on after-the-fact monitoring.