



Customer Feedback -Survey checklist

A program manager need not be a survey expert to ensure survey design best practices. Use this checklist to regularly review your program evaluations.

Format

- ☐ Is this survey professional looking?
- ☐ Is it in the right format to get usable data? On the phone, in-person, on paper?
- ☐ Do we consider sustainability in the printing and recycling of the survey?
- ☐ Is this an efficient method and use of resources? Considerations: How are survey results extracted? Who extracts the data?

Framing

- ☐ Do we collect enough background information to move into action?
- ☐ Do we collect enough background information to ensure a random or equal distribution of answers?
- ☐ Is context for the survey provided to the customer? Considerations: How are respondents invited to take the survey?
- ☐ Is there a reward for the survey? Is it appropriate? Does it catch the attention of the respondent and do you get a statistically valid sample?

Survey Question Design

- ☐ Survey starts with an introduction
- ☐ Respondent can't easily "satisfice" or take short cuts in answering questions
- ☐ My questions clear and very specific in what they are asking
- ☐ I ask about one subject at a time
- ☐ I avoided using double negatives in my questions
- ☐ My responses are exhaustive and mutually exclusive
- ☐ Reviewed questions to assess whether they are better suited to be open-ended versus close-ended
- ☐ For each question, is the concept something that can be measured on rating scale?
 - ☐ Tips:
 - ☐ Use a 5-7 point scale
 - ☐ Consider adding a middle category
 - ☐ Avoid using agree/disagree language

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- ☐ Is this a good opportunity for using branched questions? If so, are we using branched questions correctly?
- ☐ Have we assessed whether providing a neutral or middle position on our question scale is appropriate?
- ☐ "Don't know" responses are intentional
- ☐ Accounted for and limited the social desirability bias
- ☐ Overall: Have we designed the survey with the end result in mind?
 - ☐ Will we get the data we need from the questions we are asking?

Action

- ☐ Was there a feedback loop to customers once their feedback was implemented?
- ☐ Do you get usable, actionable feedback about program design, materials and the quality of coaches/workshop facilitators?

Survey Testing: Questions to ask your test subjects

- ☐ Respondent can't easily "satisfice" or take short cuts in answering questions
- ☐ My questions clear and very specific in what they are asking

Continuous Improvement

- ☐ Have you updated the survey within the last year?
- ☐ Have you ever and do you currently test the survey with internal staff or impartial users?
- ☐ Do you have a change log for your survey?
- ☐ Do you get usable feedback?

Checklist for survey design source:

<https://www.iepec.org/conf-docs/papers/2011PapersTOC/papers/071.pdf>

https://psr.ig.harvard.edu/files/psr/files/PSRQuestionnaireTipSheet_0.pdf