

# Crafting Effective Focus Groups and Customer Satisfaction Surveys

CASTA Spring 2017 Training Conference

## Customer Satisfaction Surveys

1. Are communication tools
2. Generate information regarding customer expectations and customer satisfaction
3. Provide information for improvement strategies
4. Reflect issues customers care about most
5. Measure customer perceptions, beliefs, opinions and attitudes



## Designing Customer Satisfaction Surveys

1. What should be measured? (What do you want to know?)
2. Who is your target audience? (Who has the information you need?)
3. How will you conduct the survey?
4. What format will you use?
5. What did you learn with this new information?
6. What will you do with the new information? (Strategies for improvement)

### Define the Purpose

The most critical step in research design is determining and defining the statement of purpose. Be specific.

- a. Begin with the end in mind: what will you do with this new information?
- b. A clear purpose helps guide research design.
- c. Identify the person/people in the organization will use the research results.

### Collect the Data

The following are some general customer satisfaction areas to survey:

- Overall customer service
- Listening to the customer
- Competence
- Professionalism
- Knowledgeable operators
- Polite phone/call center interactions
- Promptness in dealing with customer complaints
- On time performance
- Cleanliness of vehicles
- Safety
- Value of service
- Ability to solve problems

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## Introduction to Focus Groups

Focus groups can yield valuable information regarding the perceptions, opinions and beliefs of participants. High quality focus groups require weeks, often, months of planning. Attention to detail and development of a clear timeline and are keys to successful planning. This handout is an introduction to conducting focus groups. Additional steps include recruiting participants; obtaining consent, providing incentives and alternative reporting methods.



### 1. Determine the Method

Clearly define the purpose of the study and determine if focus groups are the appropriate research method.

*Focus groups are guided conversations, which rely on group interaction to uncover ideas, perceptions, opinions and beliefs people have about a policy, program, behavior, issue or practice.* They are not debates, brain storming sessions or work groups. It takes more than one focus group to produce valid results. The most effective focus groups are led by skilled moderators; or someone with experience in interviewing or group dynamics.

### 2. Develop Questions

Focus groups are structured around a predetermined set of questions, typically no more than twelve, which focus the conversation. It is best to begin with key questions first and work backwards. Then, develop a list of all potential questions and edit down to the best open-ended, short, conversational questions possible. Be sure to test all questions and obtain feedback.

### 3. Identify Participants

Determine the number of participants needed and recruit them carefully. Focus group data is rich, because the participants of each group have one (“homogeneity”) or more (“heterogeneity”) characteristics in common. Review the research statement and determine the characteristics or attributes the participants need to provide the necessary data. This information will determine participation in the study. It is more than inviting a few people to share their opinion about a topic.

### 4. Listen to Respondents

Effective focus groups are small groups of five to ten people, led by a moderator. The moderator usually has an assistant who takes notes and records/video tapes the groups. Among the moderator’s tasks are to generate a discussion; keep the discussion moving; and most importantly, listen. The discussion should flow from general to specific, with a clear beginning, middle and end.

### 5. Analyze the Data

There are options when analyzing and reporting focus group data. Some moderators choose to transcribe notes, while others literally cut and paste paper, creating charts. Regardless of the method, begin analyzing early and search for common themes. Compare and contrast themes. Find the big ideas. Highlight the important quotes. Prepare the report. Then, be prepared to do it all over again.