# How to Avoid Being Fired by Your Client

The Case for Measuring Customer Satisfaction in the IT Services Industry

**Autotask**®

**AUTOTASK WHITE PAPER**

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## Introduction: Customer Surveys

*"It ain't what you don't know that gets you into trouble.
It's what you know for sure that just ain't so…"*
<div align="right">Mark Twain</div>

Most service providers *believe* they're doing a good job for their clients… until the clients stop doing business with them.

If you've ever been blind-sided by a long-term customer leaving you for a competitor, or had a promising new account mysteriously drift away after just one or two engagements, you already know the importance of getting timely, actionable feedback on your products and services.

The most proven way to get this kind of customer input is through immediate and on-going customer surveys.  But, while modern survey software like Survey Monkey™, Zoomerang™ and others have made it easier to deploy customer surveys, stand-alone applications like these are not integrated with your existing business management software or processes.

That means you have to remember to send out the surveys every time you complete a service – and that means you'll have another set of tasks to consume your valuable resources valuable time. That's why most service providers don't engage in customer surveys – or do so in an ad hoc and sporadic basis – and why their client retention and profitability are lower than they could be.

Fortunately, customer survey and benchmarking tools specifically developed for the IT services industry are now available, and the best of them can automate the entire process because they are fully integrated with affordable software you can use to run your entire business.

As the IT services industry becomes increasingly congested with providers and competitors, becoming more efficient through automation is essential, as is ensuring customer retention and loyalty.

This point is emphasized by the Information Technology Infrastructure Library (ITIL), the most widely-adopted approach to IT Service Management in the world.  In its workbook *Continual Service Improvement Process*[i], ITIL declares that service *measurement* is as critical as service delivery for a healthy business, but most VARs, MSPs and other IT service providers haven't figured out how to make it a regular part of the process.

This white paper will help you better understand the critical value and importance of customer surveys to the success of your business, and includes specific suggestions on the tools available to help you to automate the delivery of your surveys, the compilation of the data, and instant alerting of responses that need your immediate attention.

## Why Are Customer Surveys Important?

In the *Journal of Direct Marketing*, Charles Gengler argues that "customer satisfaction research is not only a tool to measure consumer attitudes, but can also be a proactive tool for managing customer relations."[ii] Based on the results of his study, Gengler further asserts that, in the eyes of your customers, simply asking for feedback demonstrates your company's commitment to maintaining high customer relations and satisfaction.

Regularly monitoring customer satisfaction levels – and reacting accordingly – will help elevate loyalty and maximize retention, but that's just the beginning.  Here are 10 important benefits of using customer surveys to create a regular dialogue with your customers:

- Redeploying Resources to Address Your Most Important Issues

  Surveys can quickly pinpoint the most important issues you and your staff should be focused on – as deemed important by your customers, not your employees and management staff.

- Improving Service Quality

  A customer satisfaction survey can give you a more complete picture of your overall service delivery, not just issues requiring a "fast response" – a critical component of ITIL's Continual Service Improvement Process.

- Demonstrating Your Customer Commitment

  Even if your customers and prospects never respond to your surveys, simply asking their opinions will win you points, and earn their respect.

- Providing Customers with an Outlet

  Surveys give unhappy customers an effective outlet for venting any negative feelings they may be harboring – and you gain key data to help correct the situation.

- Measuring Staff Performance

  By linking your surveys to individual transactions or activities, and collecting that data over time, you can get solid insight into the performance of staff interacting with your clients and prospects.

- Stimulating Repeat Business

  If you sell a number of one-off services or products, a survey can often bring you back to "top of mind" with your customers, and lead to more orders… or alternatively, give you clues to potential needs you can fulfill.

- Gathering Competitive Intelligence

  Simple market surveys can provide true business intelligence about where your company, products and services stand in comparison with your competitors.

- Gathering Feedback on New Products & Services

  Do you know why a new offering is doing well, or flopping? Are there simple things you could do to make big improvements? A well-constructed survey will tell you.

- Informing Product & Service Development

  A survey focused on prospects can help you anticipate market needs and shed better light on future service offerings you should consider developing.

- Prioritizing Development Resources

  What better way to prioritize your product and service development resources, than by taking a survey of both customers and prospects?

At the end of the day, using customer surveys to gauge your performance will identify current and potential opportunities and inefficiencies in your IT services business and help you position your company for continuous growth.

## The Real ROI from Customer Surveys

It is generally accepted that it is much more expensive to attract a new customer than to retain an existing one. But, if despite knowing that customer feedback surveys will help improve customer loyalty and retention, improve product and service delivery and create competitive advantage, you still feel surveys are a "nice to have" rather than a "need to do", consider research conducted by the National Business Research Institute (NBRI).

NBRI's study not only underscores the value of client surveys in facilitating continuous improvement and strengthening your overall ability to compete, it shows a direct correlation between regularly measuring customer loyalty – *and acting on that information* – and increased profitability in your business. The study indicates that by increasing customer retention by just 5%, a typical company will increase profits 25 to 125%. Not only do loyal customers provide repeat business and increase top-line revenue, they increase profit margins by effectively reducing the marketing and operational costs associated with acquiring new customers – or reacquiring lost customers[iii].

## Specific Considerations for Surveys in the IT Services Industry

Instituting surveys into the business communication between your staff and customers undoubtedly sends the message that your organization cares about the performance of your employees and its impact on the satisfaction levels of the clients they support. Gathering opinions about your services, products and support affects your effectiveness in steering short- and long-term customer relationships. And by asking customers for their perspective on competitors' offerings you can intervene with the right solutions and better retain your clientele.

The service desk is the hub of almost every IT services business, so it makes the most sense to start there when thinking about polling your customers. Tying surveys directly to service tickets is a sure-fire way to rapidly produce meaningful metrics to help evaluate your IT services business, make necessary efficiency and service improvements, and build your bottom-line dollars.

To help you do this, it's not enough for survey software to just act as the conduit of ratings from your customers to you. To be truly empowered to make deliberate improvements in your company's customer satisfaction levels, you need to use a survey tool that goes far beyond simply hosting a questionnaire.

The data collected from a well designed customer survey program will have value well beyond rating satisfaction levels with your employees, products and services. It can be used to identify problematic trends and recurring issues before they become significant, anticipate and create new service offerings and product-service bundles, increase your efficiencies and boost recurring revenues.[iv]

## 10 Features to Look For in a Survey Tool

There are a variety of stand-alone survey tools available on the market, but to simplify your work and maximize the overall effectiveness of your continuous improvement program you'll want to select a tool that integrates smoothly with your IT business management or professional services automation (PSA) software. With that in mind, look for these features to get the most from your investment:

1. **Real-Time Client Feedback**

   The best survey tools will allow you to quickly capture and monitor feedback from your clients. You want your customers to assess your service while the issue and resolution are still fresh in their minds, and you need real-time visibility into the results so you can immediately act on them. A seamless integration between a survey tool and your business management software ensures that all happens. Results that wait to be accessed and reported on once a week or once a month simply aren't effective and lingering problems will only fester over time.

2. **Automatic Survey Delivery Based on Workflow Rules**

   A survey tool that seamlessly integrates with your service desk can automate and simplify the entire survey delivery process. The ability to create workflow rules to launch surveys based on service ticket issue types and priority levels will not only eliminate manual effort, it ensures timely delivery and response. Making it easier for customers to reply will generate more, and more valid, results and give you more reliable data points for benchmarking your performance.

3. **Multiple Response Types**

   Standard numerical scale rating systems are helpful for ranking results from a single customer over multiple questions or for aggregating results from multiple customers on a single issue, but you will often want more detailed information about specific customers and/or issues. Be sure the tool you select gives you the option to use several different response types and you'll be able to design your questions/responses to uncover the information you really need. Look for tools that support the following response types: Yes/No, Text Boxes, Multiple-Choice and Numerical Ratings.

4. **Customizable Survey Templates and Headers**

You will want your surveys to be a seamless extension of your company that reinforces your commitment to quality customer service.  To maximize that message you'll want to select a tool that allows you to customize the design of your surveys to reflect your company's branding. Professional looking surveys that include your logo, fonts and colors will make the right impression on your customers and increase credibility.

5. **'Portable' Survey URL**

There will be occasions where you might prefer to deliver a simple link to your survey – through social media tools or as a link on your website, for example.  For added flexibility and reach, be sure the survey tool you select allows you to create and paste a 'portable' URL that links to a web-based version of your survey.

6. **Flexible Delivery Options**

To be effective, your survey program needs to be responsive to your business needs and those of your customers.  Having flexible delivery options will facilitate that.  To boost overall response rates, look for options that let you automatically resend surveys to customers if you have not received a response after a specified number of days.

Equally important – especially for high-volume accounts – you'll want the ability to automatically limit the number of surveys you send to specific contacts and/or accounts over a specific time period.  This is especially helpful if you are using workflow rules to automatically fire surveys based on pre-set ticket types.  To reduce survey fatigue and help ensure your surveys aren't deleted upon receipt, you will want the ability to manipulate workflow policies to manage and limit the number of surveys contacts can be sent in a particular timeframe.

7. **Instant Surveys**

There will be times when you'll want to survey a specific customer over an issue that may not be tied directly to your workflow rules.  In those instances you'll need to be able to manually trigger a customer survey directly from a service ticket instead of relying upon the workflow engine.

8. Ratings Visibility

You'll want to be sure your staff has clear visibility into a customer's satisfaction level where and when they are interacting with them. Tools that can attach and display an aggregate satisfaction rating where your staff can see it, on an Account or Contact screen in the CRM module, for example, will increase staff awareness and eliminate the need for complicated  ad-hoc reporting before each contact.

9. Automated Alerts

The ability to take immediate action in response to a particularly negative survey result can save a customer relationship. To do that, you need a tool that can automatically generate customized email notifications to the resources in your company who need to know about it. The best tools allow you to determine the threshold survey score that would trigger notifications, and to select the resources, email addresses or account owners that need to be alerted.  Automatically identifying red-flags and escalating concerns to the right people at the right time can be critical to retaining at-risk clients.

10. Summary and Detailed Reporting Capabilities

While real-time scoring is convenient for monitoring the health of your customer relationships at a given point in time, you also need detailed, aggregate results and the ability to drill down into your data for deeper analysis. Make sure the tool you choose includes a robust reporting engine that can filter, group and display aggregated results and provide the level of detail you need to evaluate your businesses across a myriad of customer satisfaction and service delivery metrics.

## Conclusion

Collecting and acting on feedback from your clients will increase customer retention, improve product and services delivery and significantly impact your bottom line – and it's critical to any continual improvement program.  Fortunately, thanks to new technologies, the hardest part of the process is making the decision to get started, and once you've done that, you're halfway there.

Visit www.autotask.com/landing/surveys_benchmarking for more information and additional white papers about incorporating an effective customer feedback program in your own IT services business, or call Autotask Corporation directly at 1.518.720.3500 Ext. 1.

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Makes IT business run. Better.℠

## Surveys and Benchmarking in Autotask

It can be overwhelming just thinking about researching survey management programs, learning the new system once you've made a selection, and then attempting to rig-up an integration with your current business management software.

The good news is that adding Surveys and Benchmarking to your already busy routines doesn't have to be complicated. In its September 2010 release, Autotask debuted a fully integrated survey and benchmarking feature. Using the survey creation wizard makes it a snap to build your surveys, and the surveys themselves can be automated as part of your everyday workflow. Plus, the opt-in benchmarking program leverages the huge Autotask user base (35,000+ worldwide) so you can compare your performance anonymously with similar service providers.

With Autotask's built-in Surveys and Benchmarks, you will be able to:

- Easily design your surveys and messaging with the Survey Creation Wizard
  Develop your surveys with rich HTML formatting and a variety of customer response types, and include your logo and color schemes to extend your brand reach.

- Trigger surveys to fire automatically from service tickets based on your Workflow Rules
  Truly automate the client feedback process! And, you're not limited to just workflows – you can also send surveys individually by ticket, by contact, or send survey via their own URL link.

- Pre-set survey delivery frequency and how often your customers are contacted
  Configure the number of days before an unanswered survey is resent and choose a timeframe limiting how often a customer can receive surveys (i.e. "limit surveys to 1 every 7 days").

- Receive immediate notifications of survey results
  Select who should always receive results to their inbox and who should only be notified when survey results are less than or equal to your selected threshold.

- View real-time results where you need them most
  Completed scores instantly appear in the most common Autotask CRM views – in list and detail view for accounts, contacts, and resources.

- Analyze your results with detailed reporting

  Dig deep into your results and scores with summary and individual survey reports that you can group and filter to uncover a wealth of information to improve your products and services.

- Benchmark your results against your peers.

  Anonymously compare your results against the Autotask community. See an aggregate of ratings based on the pre-defined question sets, accounts, contacts, tickets, or resources.

## About Autotask Corporation

Autotask Corporation provides the world's leading hosted IT Business Management software built specifically for VARs, MSPs, and other technology solution providers to help them run their businesses better. The company's product line includes the Autotask Professional Services Automation (PSA) software, and the VARStreet family of advanced quoting and e-Commerce tools. All products work together seamlessly, and are available on demand to help IT solution providers to sell, implement, deliver and bill their technology products & services. For more information about Autotask Corporation and products, please visit http://www.autotask.com or call 518-720-3500.

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## Additional Resources

**ITIL Continual Service Improvement. Vol. 1**
ITIL, London: TSO, 2007 (print)

*Customer Satisfaction Surveys*
*ESurveysPro.com* (web)
http://www.esurveyspro.com/article-customer-satisfaction-surveys.aspx

*Use Online Surveys to Increase Customer Loyalty*
Terry, Alex; *Business Week*; September 27, 2010
http://www.businessweek.com/smallbiz/tips/archives/2010/09/use_online_surveys_to_increase_customer_loyalty.html

*Don't Get Buried in Customer Data… Use It!*
National Business Research Institute, Inc. (web)
http://www.nbrii.com/Customer_Surveys/Customer_Data.html

*How Are You Today?*
National Business Research Institute, Inc. (web)
http://www.nbrii.com/Customer_Surveys/How_Are_You_Today.html

*Measuring and Managing Customer Satisfaction*
National Business Research Institute, Inc. (web)
http://www.nbrii.com/Customer_Surveys/Customer_Satisfaction.html

*Proactive Use of Customer Surveys Increases Profits*
National Business Research Institute, Inc. (web)
http://www.nbrii.com/Customer_Surveys/Increase_Profits.html

*Taking Your Business to 'Best in Class' Success*
National Business Research Institute, Inc. (web)
http://www.nbrii.com/Customer_Surveys/Taking_Your_Business_to_Best_in_Class_Success.html

*Wise Investing: Customer Surveys and ROI*
National Business Research Institute, Inc. (web)
http://www.nbrii.com/Customer_Surveys/Wise_Investing_Customer_Surveys_and_ROI.html

*Providing Information and Insight for Increasing IT and Corporate Effectiveness*
Quantisoft; *IT Customer Satisfaction Surveys, IT Help Desk Surveys, IT Surveys* (web)
http://www.quantisoft.com/Industries/IT.htm

## References

[i] **ITIL Continual Service Improvement. Vol. 1**
ITIL, London: TSO, 2007 (print)

[ii] *Proactive Use of Customer Surveys Increases Profits*
National Business Research Institute, Inc. (web)
http://www.nbrii.com/Customer_Surveys/Increase_Profits.html

[iii] *Wise Investing: Customer Surveys and ROI*
National Business Research Institute, Inc. (web)
http://www.nbrii.com/Customer_Surveys/Wise_Investing_Customer_Surveys_and_ROI.html

[iv] *Providing Information and Insight for Increasing IT and Corporate Effectiveness*
Quantisoft; *IT Customer Satisfaction Surveys, IT Help Desk Surveys, IT Surveys* (web)
http://www.quantisoft.com/Industries/IT.htm