



**Is It Survey Time?
David Youssefnia, Ph.D.
Critical Metrics, LLC**

Clients often ask us – “What is an ideal time to conduct a survey?” The question of timing is an important one when considering when to gather feedback from your customers and/or employees. In this brief article, we answer this question by highlighting both good and bad times for conducting customer and employee surveys.

Customer Survey

A good time to conduct a customer survey is when:

- You are losing customers (it’s not good to lose customers, but it is a good time to find out why)
- You need customer input for new products/services
- You feel as though you’re losing touch with customers (surveys are a good way to keep in touch)
- Sales and/or customer service employees are complaining about dissatisfied customers
- You’ve had some success with your customers and would like their feedback and recommendations. Open-ended comments from surveys are a great source for testimonials and rating questions can provide statistics like “95% of our customers would recommend us to others”. Both of these can be very useful for marketing collateral.

A bad time to conduct a customer survey is when:

- It is difficult to access customers – either they are hard to reach or you don’t have a way to reach them
- Customers haven’t had enough time to use your products/services
- You have very few customers (you may want to consider interviewing by phone or in person)
- You don’t have enough resources (internal or external) to analyze or act on the findings

Please contact us for permission to re-print or re-distribute this article.

© 2008 Critical Metrics, LLC

255 West 36th Street, Suite 800
New York, NY 10018
Phone: 212.675.9211

Email: info@critical-metrics.com
www.critical-metrics.com



Employee Survey

A good time to conduct an employee survey is when:

- New management is in place
- Turnover is increasing
- Recent changes have occurred in business direction
- It has been at least 6 months since you hired a significant number of employees
- You aren't sure if employees understand where the business is headed
- You don't know what employees are thinking about the business
- Customers begin to complain and/or you start to see a spike in customer attrition

A bad time to conduct an employee survey is when:

- There is so much going on in the business that you aren't able to focus on sharing the findings with employees or commit to acting on the issues
- It is the busiest time of your business cycle (e.g., holiday season for retail)
- You just finished a survey (within the previous 6 months)
- There is a lack of resources for internal or external support (unless you are an expert, it is very dangerous – although tempting – to conduct a survey on a shoestring budget)
- Many employees will be on vacation
- You just hired a significant number of employees; it is advisable to give new employees at least 6 months to acclimate to their jobs and their new organization

We hope these lists are helpful. If you find that the “good times” list(s) describes your situation, please pick up the phone or send us an email and we'd be happy to speak with you about how we can help.

Please contact us for permission to re-print or re-distribute this article.

© 2008 Critical Metrics, LLC

255 West 36th Street, Suite 800
New York, NY 10018
Phone: 212.675.9211

Email: info@critical-metrics.com
www.critical-metrics.com