CUSTOMER FEEDBACK SURVEY CHECKLIST

Use this checklist to ensure SEM survey design best practices, including formatting, framing, survey question design and continuous improvement.

☑ FORMATTING

- ☐ Ensure a professional-looking design
- ☐ Design the survey to easily collect usable data, whether on the phone, in-person, or on paper
- ☐ Consider sustainability in the printing and recycling of the survey

☑ FRAMING

- ☐ Be sure your survey collects enough background information to:
  - ○ Smoothly move into action
  - ○ Ensure a random or equal distribution of answers
- ☐ Provide ample context for the respondent to complete survey
- ☐ Consider including an attention-grabbing reward for survey completion

☑ SURVEY QUESTION DESIGN

- ☐ Begin your survey with an introduction that provides necessary context and guidance
- ☐ Craft questions that deter respondent shortcuts while answering questions
- ☐ Use specific language to make it clear what each question is asking
- ☐ Design the survey with your end results in mind to ensure you collect the data you need from the questions you ask
- ☐ Only ask about one subject at a time
- ☐ Avoid using double negatives in your questions
- ☐ Ensure that response options are exhaustive and mutually exclusive

☑ SURVEY QUESTION DESIGN (CONT)

☐ Review your questions to assess whether they:

- Should be open- or close-ended
- Can be measured on rating scale
- Limit responses affected by social desirability bias (i.e., the tendency of survey respondents to answer questions in a manner that will be viewed favorably by others)

☐ Consider survey best practices, including:

- Using a 5–7 point scale
- Adding a middle category
- Avoiding agree/disagree language
- Employing branched questions, where appropriate
- Including a neutral or middle position on questions scales, where appropriate

☑ CONTINUOUS IMPROVEMENT

☐ Review and update the survey every year

☐ Test the survey with internal staff or impartial users, to ensure questions are clear and concise

☐ Maintain a change log for your survey

☐ Collect and record usable feedback during each survey round

FURTHER READING

Consult these resources for more survey design insights and best practices:

- *Think before You Do: The Importance of Survey Design in Program Evaluation* (International Energy Program Evaluation Conference)
- *Tip Sheet on Question Wording* (Harvard University Program on Survey Research)

This guide was developed by the Northwest SEM Collaborative's Beyond the E working group.

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