

Customer Survey Checklist

BONUS CONTENT



Survey Preparation

/ 3 pts

- ☐ **Experiment Mindset:** A survey should start from a specific need. Why do you want to send a survey in the first place? Treat it like an actual growth experiment. Write down your hypothesis and expectations. Don't just send surveys for the sake of sending surveys.
- ☐ **Tool:** Avoid using Net Promoter Score® for every user research project and OKR you want to measure. Even the creator of NPS said that was not the intended use of NPS. Other more straightforward metrics (CSAT, classic ratings or likert scales, etc) are often a better choice.
- ☐ **Scope:** Avoid mass-blasting surveys (whether by email or in-app). Focus your surveys on a random subset of people first (to avoid sampling bias). Aim for release rings where you start with 10% of your sample, review the early results, and gradually increase your reach. This allows you to spot flaws in your survey, tweak questions and prevent spammy mistakes.



Survey Delivery

/ 7 pts

- ☐ **Priming:** try to let customers know in advance that you might reach out to get their opinion. They will be much more likely to answer. For example, if you send a survey after a customer representative finishes a call or a ticket, ask your reps to give customers a heads up about the survey so that your customers will expect it (see [Priming Effect](#)).
- ☐ **Sender information:** If possible (and legal in your context), use a human sender (e.g., *james@company.com* vs. *marketing@company.com*). People care disproportionately about an individual compared to a vague group. It's called the [Singularity Effect](#).
- ☐ **Human:** Avoid heavily branded emails when you ask for feedback. Your company's email signature will likely already have your brand visible. That's more than enough.
- ☐ **Reply Management:** Don't block the replies to your sending email. Avoid emails like *do_not_reply@company.com*. They communicate that you don't care about hearing from your customers (a paradox for a survey). Also, you'll collect valuable feedback from direct replies.

- ☐ **Subject line:** be extremely careful with your subject line. Most email surveys suffer from the *Law of Shitty Clickthroughs* because they have been abused. Try to stand out a bit to avoid [information filtering](#). Just make sure you avoid unethical subject line clickbait.
- ☐ **Contextual:** Frame your question around the context of the customer's journey. Use personalization if possible (e.g., "I'd love to get your feedback about your experience with James earlier today").
- ☐ **Timing:** Be mindful of when you ask your customers for feedback. You should align the timing with their experience (see the previous point, *Contextual*). Just be aware that your chosen timing will induce a response bias. For example, a segment of customers who have been using your product for only 2 weeks will likely be less satisfied than your "more than 3 years" segment. That's because of [survivorship bias](#).



Survey Presentation

/ 4 pts

- ☐ **Concise:** Get straight to the point with a quick intro. Avoid walls of text and lengthy paragraphs before your survey question. A brief 2-liner introduction is often enough.
- ☐ **Feedforward:** Frame the investment so that customers know what to expect. (e.g., how long will it take to answer? 10 seconds? 5 minutes? How many questions are there?)
- ☐ **Benefit:** Why should survey participants care about your survey? What's in it for them? Highlight the benefit and how it will help you create a better experience for them.
- ☐ **Relationships > Incentives:** Avoid survey bribes such as gift cards. These incentives tend to skew results, and they are a sign that you didn't nurture the customer experience sufficiently beforehand. It's like in real-life. Imagine if your friends don't want to hang out with you... would your first solution be to offer them a 40\$ bribe? Or work on the quality of your relationship? Focus on developing lasting customer relations so that people will want to help you (see [Reciprocity](#)). It requires time and effort, but it pays dividends in the long term.



Survey Experience

/ 5 pts

- ☐ **Spark:** Starting the survey should feel effortless ([Spark Effect](#)). The first trigger should be low friction. For example, have the first question directly embedded as an interactive widget in your email if possible. Experiments have shown that this converts better than a static email link that says "Start survey here" for instance.

- ☐ **Short:** only ask the questions you absolutely need to respect people's time. Survey completion rates drop by 10-20% for every additional question. If your survey software allows it, try to capture partial survey data to maximize your usable data set.
- ☐ **Gradual:** If your survey has more than one question (the one shown in your email), order them by difficulty. In other words, show your simplest and shortest questions first to increase the completion rate ([Progressive Disclosure](#)).
- ☐ **Focus:** Don't waste your customers' precious time on basic profile questions (e.g., asking for the email in a survey sent by email, company name, etc.). You could easily get that information from a third-party like [Clearbit](#) if you needed to. Focus your survey on unique research nuggets.
- ☐ **Clarity:** Your question should evaluate a single element. Is it an employee? A specific part of your customer experience? Your entire brand? Avoid [double-barreled questions](#).



Quality & Insights


/ 4 pts

- ☐ **Qualitative:** Don't fall into the trap of quantitative-only surveys. Ratings tell you what people think on average. But what's most important is the *why* behind the data, or else you're stuck with a score you cannot act on (that's also true for NPS surveys).
- ☐ **Use Feedback Nudges:** For open-ended questions, encourage respondents to be as exhaustive as possible. A simple helper text like "Please be as detailed as possible to help us understand" can increase the average open-ended answer length by up to 300%.
- ☐ **Visibility:** Don't let your survey answers rot away in an Excel Spreadsheet. Visibility is the oxygen of customer feedback. Try to connect your survey answers to a Slack channel instead of a remote database. That builds more customer empathy internally in your company, and quickly highlights potential survey flaws (or even forgotten automated surveys that should be stopped).
- ☐ **Follow-up:** when you've read helpful customer feedback, feel free to send a personalized follow-up email to the respondent to thank them for their input. You'd be surprised how much people appreciate knowing that the time they invested wasn't wasted. People like feeling like they are being heard and respected.

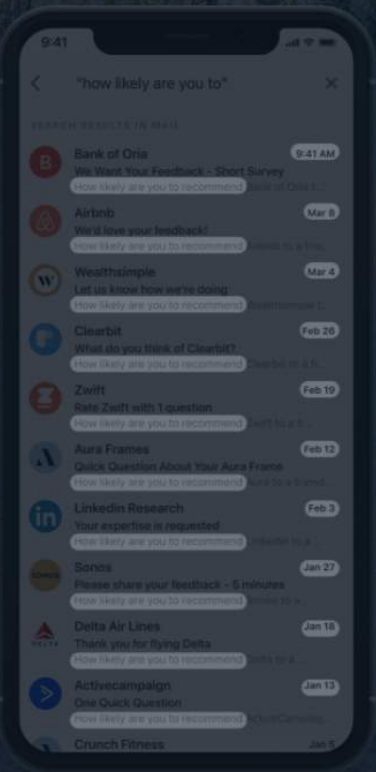


Case Study Insights Summary

Here are all the psychology and user experience insights covered in the case study:



MISTAKE #1 OF 5
Relevance




#PSYCHOLOGY INSIGHT

Information Filtering

There's so much information in the world that your brain needs to take shortcuts to save time and energy (i.e., *System One*¹).


For example, you instinctively put the promo flyers in a trash pile:



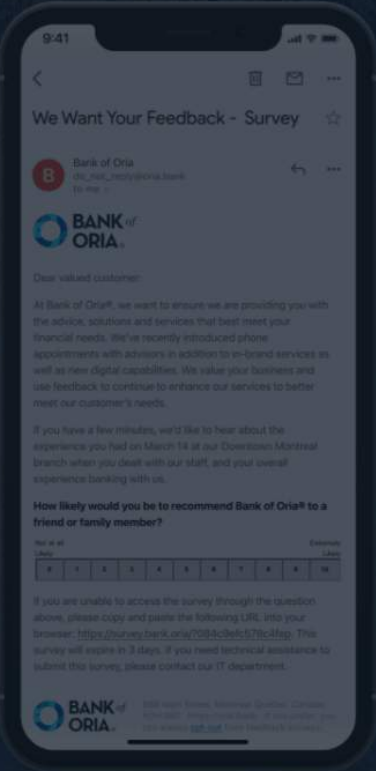
The same thing happens in your inbox. You instantly know if an email is worth reading or not based on patterns (subject, sender, layout, etc).

It's why NPS® emails suffer from the *Law of Shitty Clickthrough*² and average a disappointing 3% completion rate.³

¹ System One Thinking, fs.blog Study (2022)
² Law of Shitty Clickthroughs, Andrew Chen (2018)
³ Average Email CTR, Constant Contact (2022)



MISTAKE #3 OF 5
Clarity



#DATA INSIGHT

Double-Barreled Questions

Combining statements like this creates an informal fallacy called a *double-barreled question*¹. What is evaluated is not clear, so the results are unreliable.

¹ Double-Barreled Questions, SurveyMonkey (2021)

#UX INSIGHT

NPS Inaccuracy

Studies have shown that Net Promoter Score® survey questions are:

- **Misunderstood:** survey respondents often don't understand the strange hypothetical wording of the question.¹
- **Inaccurate:** NPS is a bad predictor of future customer loyalty and growth². The most reliable research questions are about past behavior, not the future (see *Projection Bias*³).
- **Flawed:** the science behind NPS is noisy by design⁴. It relies on problematic assumptions, arbitrary categorization and the answers are prone to misclassification.⁵

¹ NPS Surveys are Harmful, Jared Spool (2017)
² Retiring NPS, Forbes (2019)
³ Projection Bias, Decision Lab (2022)
⁴ Dubious NPS Fad, WSJ (2019)
⁵ Where NPS goes wrong, Harvard Business (2019)

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#PSYCHOLOGY INSIGHT

Hick's Law

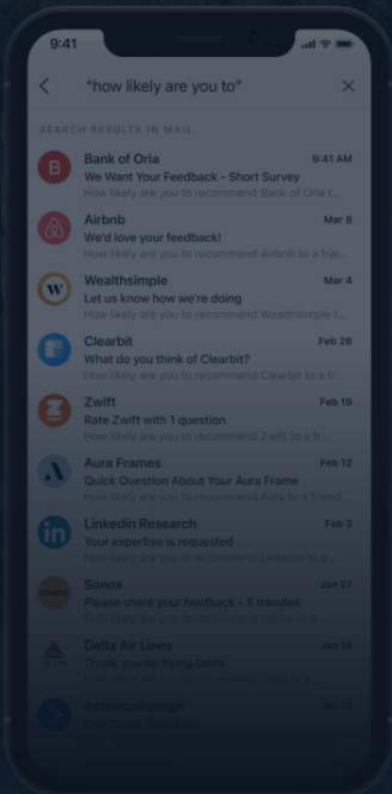
The effort needed to make a decision increases with the number of options¹. This problem is multiplied by the small size of the survey buttons (*Fitts' Law*²).

NPS surveys impose 11 options (0 to 10), but research has shown that this extra complexity does not even make the results more accurate (nor reliable)³.

¹ Hick's Law, Psychology of Design (2021)
² Fitts' Law, Psychology of Design (2021)
³ NPS Surveys are Harmful, Jared Spool (2017)

MISTAKE #5 OF 5
Complexity

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#DATA INSIGHT

The NPS Fallacy

NPS surveys are frequently **misused** by companies¹ and are easy to game.²

Even the inventor of NPS said:

"I had no idea how people would mess with the score to bend it, to make it serve their selfish objectives."³

It's a good example of Goodhart's Law: when a measure becomes a target, it ceases to be a good measure.⁴

Net Promoter Surveys give an illusion of accuracy to companies, while shifting its pervasive burden to customers.⁵

¹ Muddled Marketing Metrics, MIT Sloan (2016)
^{2,3} Dubious NPS Fad, WSJ (2019)
⁴ Goodhart's Law, Sketchplanations (2022)
⁵ NPS Surveys are Harmful, Jared Spool (2017)



Additional Resources



Product Psychology Course.

If you want to learn how to use psychology to create better experiences for your customers, check out our course:
<https://growth.design/course>



Cognitive Biases Cheatsheet.

100+ cognitive biases and design principles that affect your product experiences. Tons of product examples, tips and checklists to improve your user experience:
<https://growth.design/psychology>

—Dan Benoni & Louis-Xavier Lavallée