



POV: ENSURING THE EFFICACY OF CRM SURVEYS

DECEMBER 2014



ENSURING THE EFFICACY OF CRM SURVEYS

Email surveys can be a truly valuable component of pharmaceutical CRM programs. If the survey is designed thoughtfully and the data collected properly, surveys can:

- + Provide feedback on content
- + Invite customer engagement
- + Gather valuable data for campaign customization
- + Identify trends
- + Track customer satisfaction

Below, Intouch Solutions' CRM experts share best practices for ensuring CRM survey emails work their hardest for pharma brands.

SURVEY BEST PRACTICES

OPT-IN

It is important to understand any legislation that may affect delivery or data collection. For example, marketers sending emails in North America must be cognizant, of course, of the [2003 CAN-SPAM Act](#) and, more recently, the Canadian Anti-Spam Legislation ([CASL](#)). Marketers also must ensure their audience has verified they wish to receive the communication.



PLAN AHEAD FOR CONCEPTION AND CLARITY

When creating a survey, marketers must:

- + Embrace a consistent tone and voice
- + Focus on clarity
- + Set expectations
- + Inform the users of survey length

ESTABLISH TERMS, CONDITIONS AND PRIVACY

Terms and conditions text should be used to:

- + Inform users of how their information will be utilized



- + Inform users of their rights as a participant
- + Capture attention and communicate the purpose
- + Describe any relevant incentives

PRACTICE REAL-TIME CONTENT TARGETING

Surveys for pharmaceutical brands should segment and target patients and professionals based on responses. In turn, this practice improves retention and success rates.



EMBRACE DATA CAPTURE OPPORTUNITIES

In addition to the survey response data itself, data collected behind-the-scenes can be just as valuable. Marketers should determine the survey objectives, KPIs and metrics first and then seek to collect as much as possible, relevant to those measurements. Within reason, data should only be excluded if it is certain to never be valuable for future measurement.

MIND THE LENGTH

SurveyMonkey analyzed 100,000 random surveys conducted by users to understand drop-off rates in comparison to increased survey length. The finding was as expected: the more questions per survey, the higher the drop-off rate.

If a targeted audience is heavily invested, they are more likely to complete a longer survey, and conversely, an unfamiliar audience should only be asked to complete a succinct survey.

TIMING IS EVERYTHING

Survey frequency should be based on the frequency of program updates. Notable updates can be followed by a survey. Better yet, users can be sent a survey at personalized times specific to their individual journey. Implementing automated deployment timing means that a survey can be sent at the precise times that a user can give valuable, relevant feedback.

IMPLEMENT USER SCORING

In the past, survey success was measured by coupling response rates with Net Promoter Scores. Now, marketers must take this scoring one step further by introducing user scoring.

User scoring is a process that triggers system functions when a combination of events occurs. This allows for communication at critical points, based on historical user behavior.



DO'S & DON'TS

As surveying evolves, there are both practices to implement and those to be avoided at all costs — particularly for pharma marketers.

DO'S

- + Ensure all respondents receive the same survey. Providing questions in different orders can result in different experiences, rendering unexpected consequences in data.
- + Establish comprehensive response lists to ensure respondents will have an answer that best represents their attitude. Make clear, however, if respondents are expected select just one or multiple answers.
- + Be consistent in formatting and safeguard against unanswered questions by limiting the use of ranking.
- + Keep questions clear, concise and to the point to ensure a positive experience and valuable data.

DON'TS

- + Pharmaceutical regulatory advisors prefer to avoid inviting unprompted or open-ended (open text field) questions. While it may seem counterintuitive to a positive user experience, open-ended questions can spark a host of situations difficult to manage from a regulatory and legal perspective. Many pharma organizations are not equipped to handle these situations, so instead, use questions with a comprehensive list of preapproved responses.
- + Avoid biased questions and self-selected opinion polls. These may guide individuals to answer in a specific way, which may cause response fatigue and abandoned surveys.
- + Avoid negative terms within questions. Users may skip reading words such as “not,” rendering inaccurate responses.
- + Avoid compound questions touching on more than one issue. Complex questions may result in user confusion and inaccurate data.

With the evolution of modern marketing and the sophisticated use of data, email surveys today are much more than fun quizzes. Following the above best practices will help ensure your surveys are a valuable component of not just CRM campaigns, but the entire marketing program itself.

© Intouch Solutions 2014
Author: Mark Stephan, CRM analyst

 **Kansas City**
913.317.9700

 **Chicago**
312.540.6900

 **New York**
646.795.3600

www.intouchsol.com
email: info@intouchsol.com
blog: intouchsoul.com
twitter: [@intouchsol](https://twitter.com/intouchsol)