

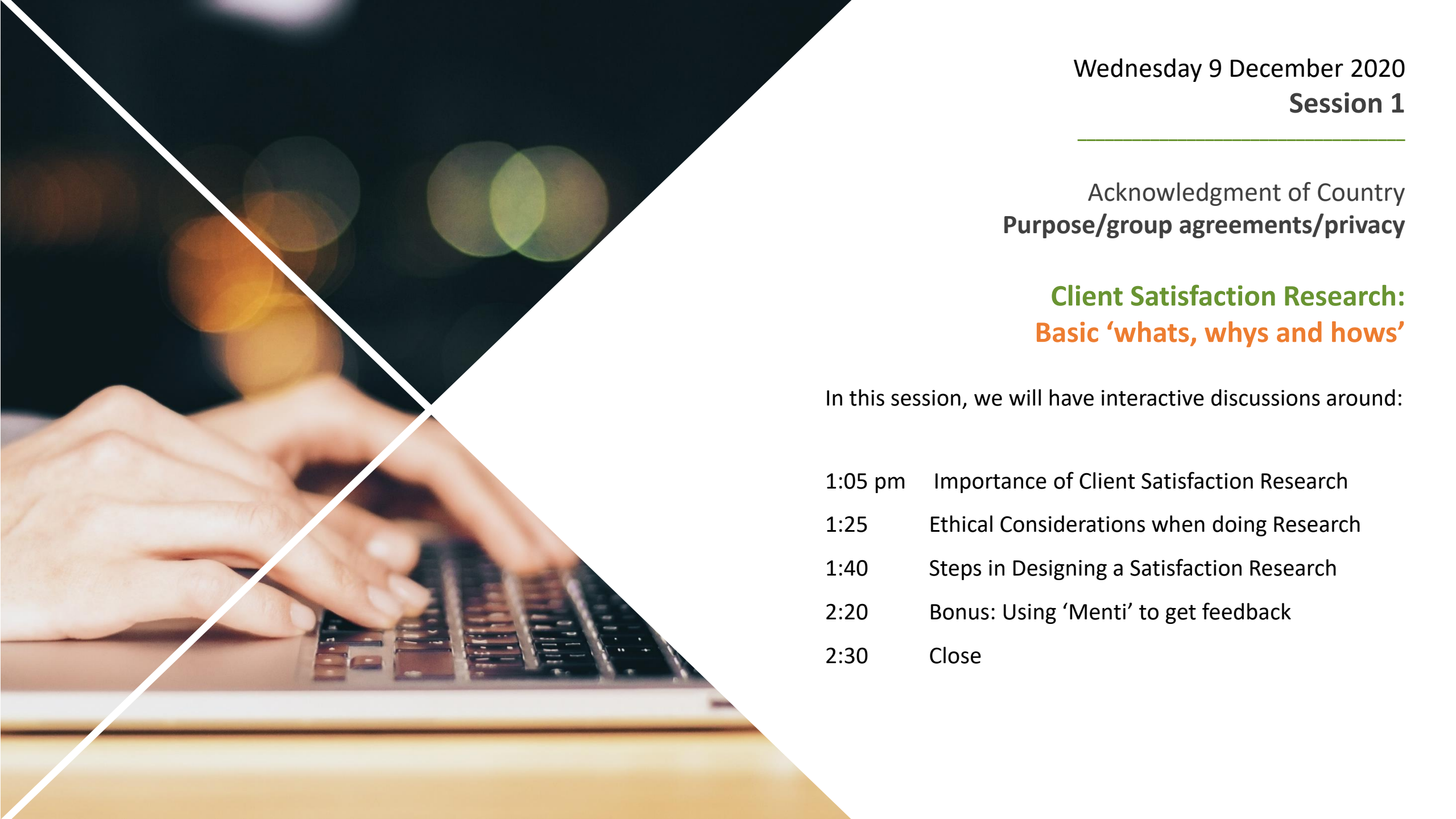
Designing Client Satisfaction Research:

**Pilot online sessions for
CALD community workers**

9 & 15 December 2020

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Wednesday 9 December 2020
Session 1

Acknowledgment of Country
Purpose/group agreements/privacy

Client Satisfaction Research:
Basic 'whats, whys and hows'

In this session, we will have interactive discussions around:

- 1:05 pm Importance of Client Satisfaction Research
- 1:25 Ethical Considerations when doing Research
- 1:40 Steps in Designing a Satisfaction Research
- 2:20 Bonus: Using 'Menti' to get feedback
- 2:30 Close

ACKNOWLEDGEMENT AND DISCLAIMER

Content for these two sessions were adapted (with revisions) by NCOSS from a video series that was originally developed by Survey Matters for NCOSS, under funding from Community Sector Banking. While we have made every attempt to ensure accuracy and reliability, neither NCOSS nor Survey Matters is responsible for any errors that may result from the use of information in these materials. All content is provided 'as is', with no guarantee of completeness, accuracy, timeliness, or results obtained from their use.

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Our reference material: **NCOSS video series on Customer Satisfaction Survey**

<https://www.ncoss.org.au/sector-hub/sector-resources/ncoss-customer-satisfaction-survey-toolkit/>

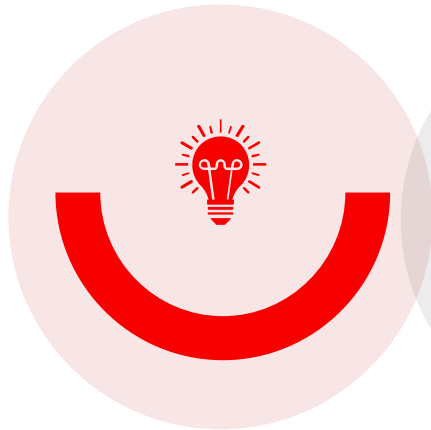


NCOSS video series on Customer Satisfaction Survey

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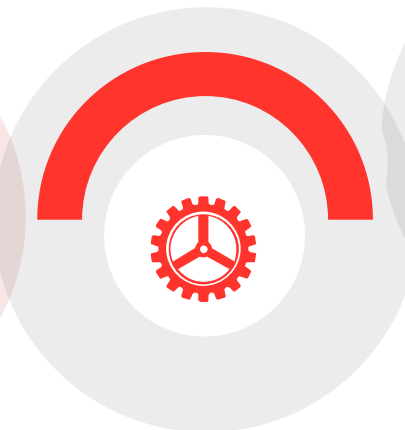
VIDEO 1

**The Importance of
Customer
Satisfaction Surveys**



VIDEO 2

**Designing the
Research**



VIDEO 3

**Designing
Questionnaires
and Surveys**



VIDEO 4

**Doing
Fieldwork
and Managing
Responses**



VIDEO 5

**Analysing and
Reporting
Data**



VIDEO 6

Ethical Compliance



INTRODUCTION (5 minutes in breakout rooms)

Quick questions before we start.

What comes to mind when you hear “customer satisfaction”?

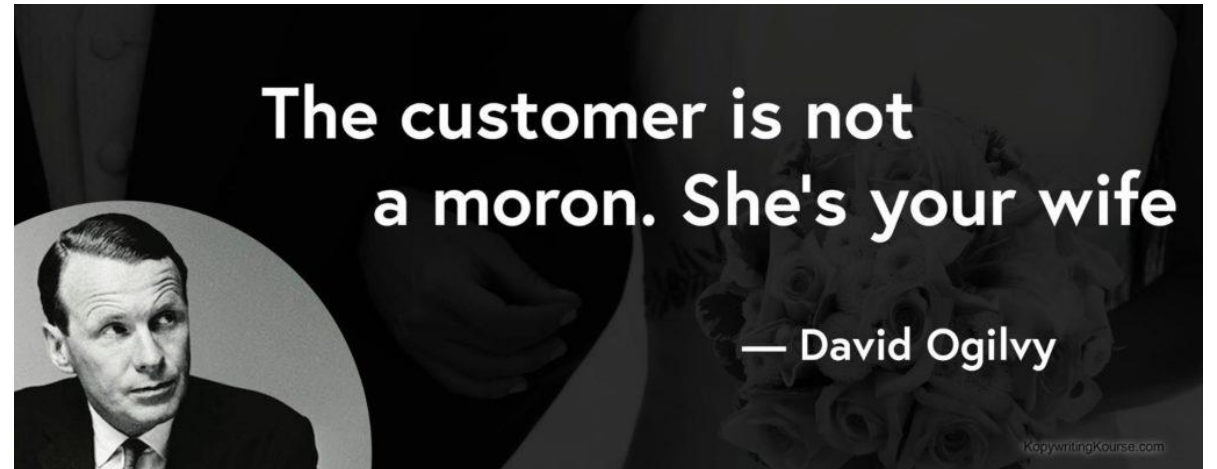
Why are you here today? What exactly would you like to learn?



Do you agree or disagree?



Right or wrong, the customer is always right.
(Marshall Field)



The customer is not
a moron. She's your wife

— David Ogilvy

Do you agree or disagree?

Le client n'a jamais tort (Swiss)

The customer is never wrong.

- César Ritz, founder of Ritz Carlton hotels

Der Kunde ist König (German saying)

The customer is king.

El cliente siempre tiene la razón (Spanish saying)

Il cliente ha sempre ragione (Italian saying)

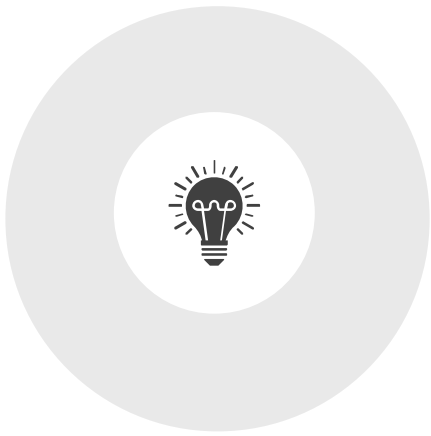
The customer always has a reason.

Okyakusama wa kamisama desu お客様は神様です

(Japanese saying)

The customer is a god.

Is there a 'Customer Is Always Right' saying in your native land?



Quick definition of terms as used in these sessions

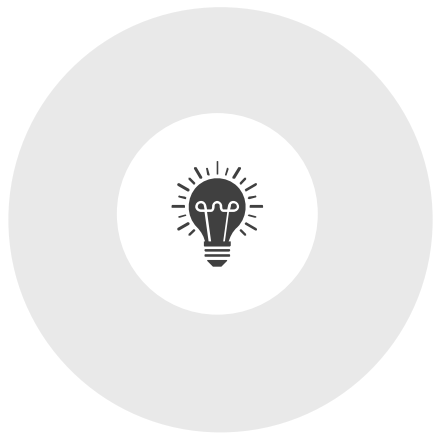
We will use ‘client’ instead of ‘customer’ from hereon.

“Satisfaction”

Used in broad terms in some parts. Basically, it’s finding out whatever we’d like to find out about our clients in relation to our services (attitudes, preferences, thoughts, etc).

“Client”

Could be any of our stakeholders: service user, volunteer, partners in other orgs, participants, community member.



1) Why is client satisfaction research important?

a)

Connect with Clients

b)

Improve Services over Time

c)

**Capture and communicate
social impact.**

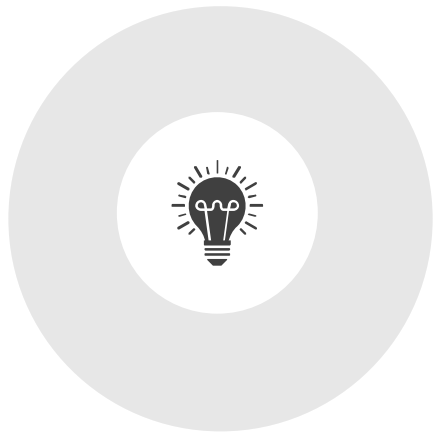
d)

**Funding Application &
Reporting**

e)

Build Your Brand

NOTE: We will use 'client' instead of 'customer' (or the more widely preferred 'service user') from hereon.



1) Why are client satisfaction surveys important?

Q. Quick poll.

What is your current top reason for capturing client satisfaction...?

- a) Connect with clients
- b) Improve services
- c) Understand impact of services on people and communities
- d) Funding application & reporting
- e) Build your brand

What do you think should be your top reason for capturing client satisfaction?

Q.

Dig deeper.

SPECIALIST HOMELESSNESS SERVICES

CLIENT SATISFACTION SURVEY, 2019

56

services took part in the survey

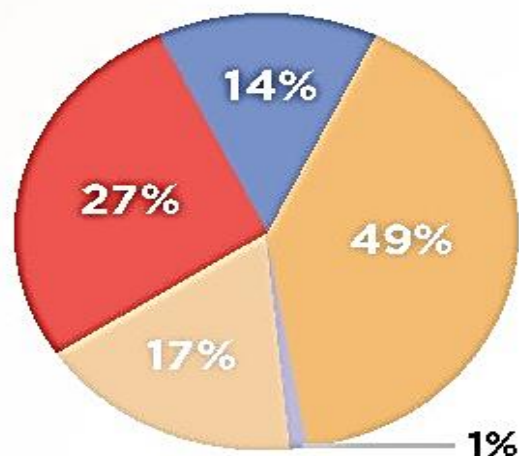
1,051

participants completed the survey

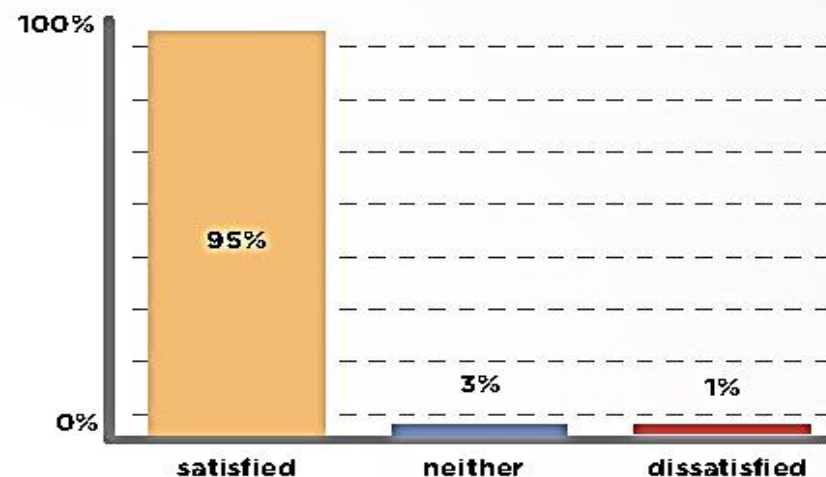
DEMOGRAPHICS OF SURVEY PARTICIPANTS

KEY

- Aboriginal or Torres Strait Islander
- Migrant (not born in Australia)
- Born in Australia (not ATSI)
- Refugee or Asylum Seeker
- None of the above



OVERALL SATISFACTION WITH SERVICES PROVIDED



SERVICE PROVISION

99%

agreed staff treated them with **respect**

92%

agreed staff were sensitive to their **ethnic and cultural background**

83%

agreed staff explained **how to make a complaint** about the organisation

Q. Optional activity.

a) Do you have an example of how a Client Satisfaction research in your organisation...

- led to a change in the way services are provided? OR
- led to identifying 'at risk' clients?

b) What is the most challenging part for you when doing Client Satisfaction research?





2) Ethical considerations

Ethics: 'right' and 'wrong', or 'good and bad way' of doing things

Why are ethics important?

- To protect all participants- from researcher to respondents.
- To build good data governance guidelines.



2) Ethical considerations

Ethics: 'right' and 'wrong', or 'good and bad way' of doing things

Five Ethical Principles in Research

1. Privacy
2. Confidentiality
3. Transparency
4. Data security
5. Special populations

Privacy

Australia's Privacy Act 1988 & Australian Privacy Principles

These regulate how personal information is handled.

- What is considered personal information?
- Are small NGOs bound by the Privacy Act?
- Can organisations use or disclose personal information?
- What is *de-identification*?



Confidentiality

- How do you make sure that client's personal information remains confidential?
- Are your clients allowed to say 'no' to participating?
- Can you disclose who has or has not participated in your research?
- When reporting results, how do you avoid other people finding out 'who said what'?
- Who is allowed to know 'who said what'?
- What if a third party requests access to your respondent's data?



Transparency

Transparency means that your clients know what they need to know prior to participating in your research:

- ✓ Clients need to know -
 - the research purpose
 - how results will be used
 - who's doing the research
 - about confidentiality & privacy
- ✓ Clients need to give informed consent.
- ✓ Clients know they can withdraw any time.



Data security

How secure is the data you're collecting??

- Are your computer devices and platforms protected by passwords?
- Who has access to identifiable data?
- Do you have signed consent forms from clients, if you're giving their personal information to people outside your organisation?
- Are you de-identifying data as soon as practically possible?
- How long are you storing identifiable data?



Working with children

- Take extra care when doing research among children and young people (under 18 years) to protect their interests.
- NSW requires Working With Children Check for adult employees expected to come into contact with children.
- If you suspect child abuse in the course of your research (physical, emotional, sexual abuse or neglect), you may be required to report the suspected case of abuse to authorities.
- Be familiar with any changing NSW reporting requirements before doing any research with children.





Wrapping up:

**Questions or nuances under
Ethical considerations?**

3) Steps in designing Client Satisfaction Research



O M S A

3) Steps in designing Client Satisfaction Research?

a

WHY

Define your Objectives.

What are you trying to solve or find out?

b

HOW

Select Your Methodology.

- Quantitative (e.g. survey)?
- Qualitative (e.g. interview)?
- A bit of both?

c

WHO

Identify your Sample.

- Who would you like to ask? How many?
- How are you going to reach them?

d

WHAT TOOLS & WHEN

Choose your Approach.

How are you going to ask?

- face to face
- written (by post)
- online
- telephone



2) *Con't.*

What are the key steps in designing Client Satisfaction Research?

a) Define your objectives.

This is the most important step in your research.

- What exactly do you want to find out from your research?
- What '*big question*' or problem are you looking to solve?

Q. Dig deeper

ABC Migrant Resource Centre is funded to support newly-arrived female migrants, 65 years old and above. On a piece of paper (that you can share onscreen with the group afterwards), write one sample question for each row in column B.

A) Objective or ‘big question’	B) A sample question that you might want to ask
1. You want to capture highlights for your organisation’s Annual Report.	
2. You want to know what would make your clients participate in new activities in 2021.	
3. You want to plan learning and development activities for your volunteers in 2021.	

b) Select your methodology.

Qualitative

- “Open” or less structured questions.
- Explores attitudes and opinions in more detail or depth.
- Findings cannot be generalised to wider population.

Example (in face-to-face interview):

What kind of support from ABC was most helpful for you in 2020?

How did they help you? Or your family?



Quantitative

- Closed and structured, pre-planned questions (e.g. yes or no, multiple choice, tick boxes).
- Seeks to get ‘majority opinion’.

Example (using feedback form)

Which of the following support from ABC helped you most in 2020?

- (a) Zoom information sessions
- (b) Facebook chat group
- (c) end of year outing
- (d) others, please specify...

Quick Q.

Can you include both qualitative and quantitative questions in the same research/survey?

Q. Which method- quantitative or qualitative?

Objectives A

- Understand an issue or problem.
- Explore feelings and ideas about a topic.
- Understand different perspectives between groups.
- Tell a story or develop case studies.
- Explain results from a quantitative study.

Main purpose:

To write short stories about the positive impact of your information sessions on the over-all settlement experience of five (5) newly-arrived migrants.

Objectives B

- Provide data and numbers.
- Understand majority opinion.
- Provide evidence of outcomes.
- Recommend an activity or approach.
- Understand the size, activities and preferences of smaller groups within a bigger group.

Main purpose:

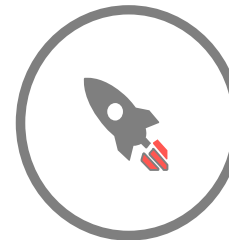
To find out the percentage of people (among your newly-arrived migrant groups) who agree that your information sessions gave them confidence to seek help from government services.

c) Identify your sample group.

- Your sample group (e.g. survey respondents) must reflect your objectives.
- Consider your budget, time and how easy/hard it is to reach your 'sample'.



Who are you trying to reach?



Can you achieve a representative sample?



How do you reach them?

Who are you trying to reach?

Q. 'Trick Question'.

You're putting together a volunteer training calendar for 2021. In what instance would you choose sample group 1? Sample group 2?

SAMPLE GROUP 1

- Volunteers from all age groups
- Long-time volunteers (2+ yrs)
- Active in the past 6 months
- Target: 50 respondents

SAMPLE GROUP 2

- Younger volunteers only, 21-35
- Both old and new
- Active in the past 12 months
- Target: 10 respondents

Tip

depend on the
of your research and
answer your key
ch questions



Aim for a representative sample.

Q. Quick question. Your volunteer group is-

- 25% under 30 years old
- 50% between 30 and 60
- 25% over 60

What would be your aim for a “representative sample”?

Guidelines:

- It should reflect the characteristics of your bigger target group.
- Not always possible, but aim to achieve it. Say in your analysis if your sample is not representative.



Tip

We do cover this topic in more detail in video 4, Fieldwork and response management.



How will you reach your respondents?

- Face to face?
- Online?
- Paper / mail?
- Telephone?

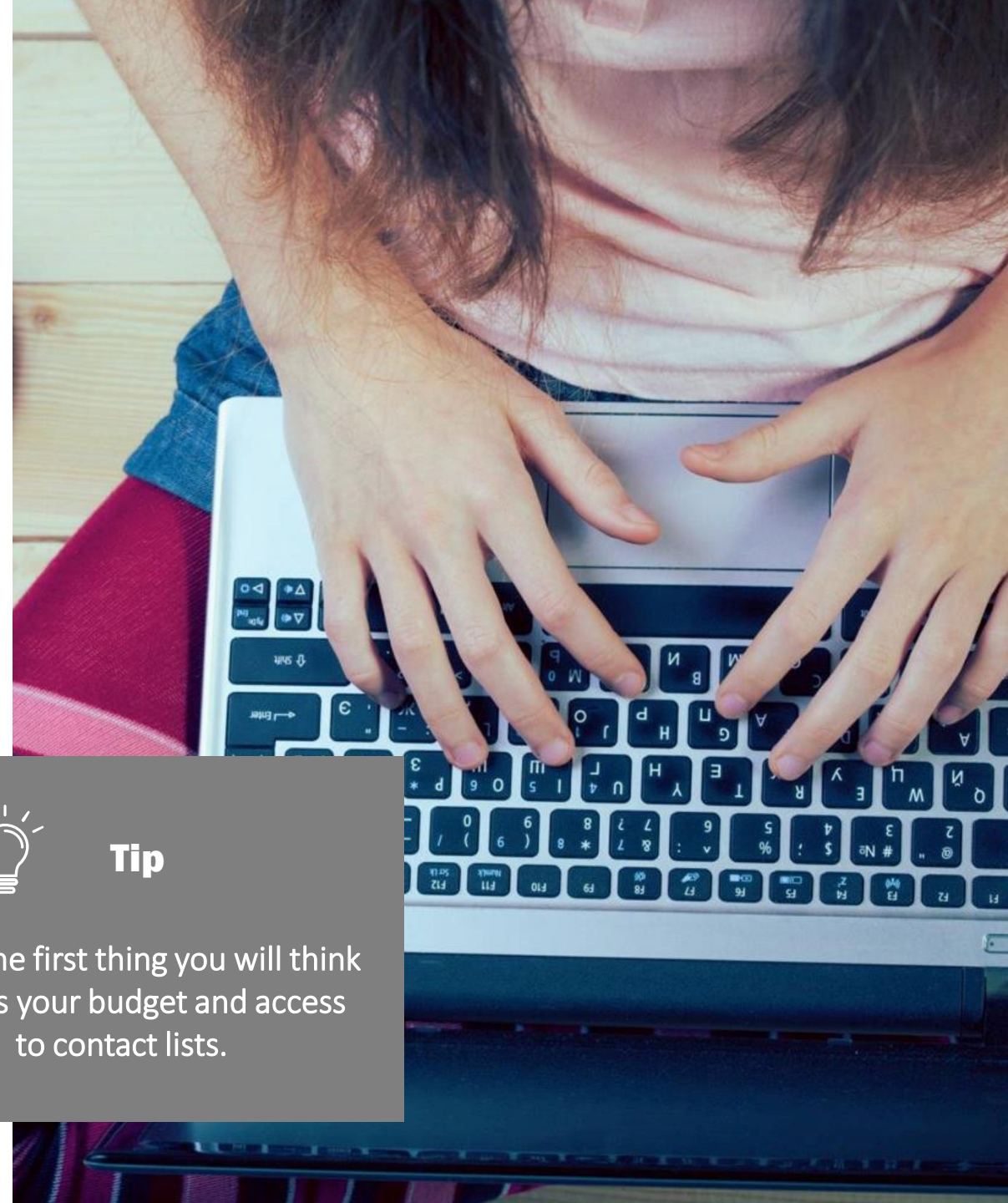
Your approach depends on your-

- ✓ Objective
- ✓ Budget
- ✓ Target group



Tip

Often, the first thing you will think about is your budget and access to contact lists.





Face to Face

Pros

- Accurate screening
- Respondent is focussed
- Captures verbal and non-verbal cues
- Often the only way to reach target group

Cons

- Cost
- Manual data entry
- Data quality dependent on interviewer



Online Survey

Pros

- Quick and inexpensive
- Can collect a larger sample
- Can be analysed immediately
- Respondents can take their time

Cons

- Email can be filtered to spam
- Possible technical glitches
- Self completion means survey can be abandoned
- Requires internet access



Paper or Mail Surveys

Pros

- Convenient in range of settings
- Access respondents without internet
- Can be used if don't have lists of respondents

Cons

- Expensive and slow
- Manual data entry
- Respondents can skip questions



Telephone surveys

Pros

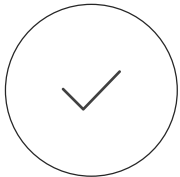
- Convenient
- Reach a large number of respondents
- Improve data quality

Cons

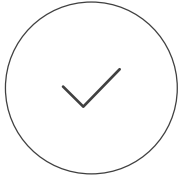
- Expensive
- Training for interviewers
- Problems reaching respondents

Q. Dig deeper.

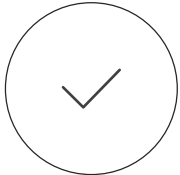
For the CALD communities that you work with, share some advantages and disadvantages of each of approaches below.



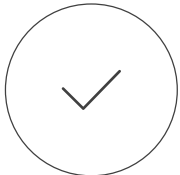
Face to face (survey or interview)



Online survey



Paper / mail survey

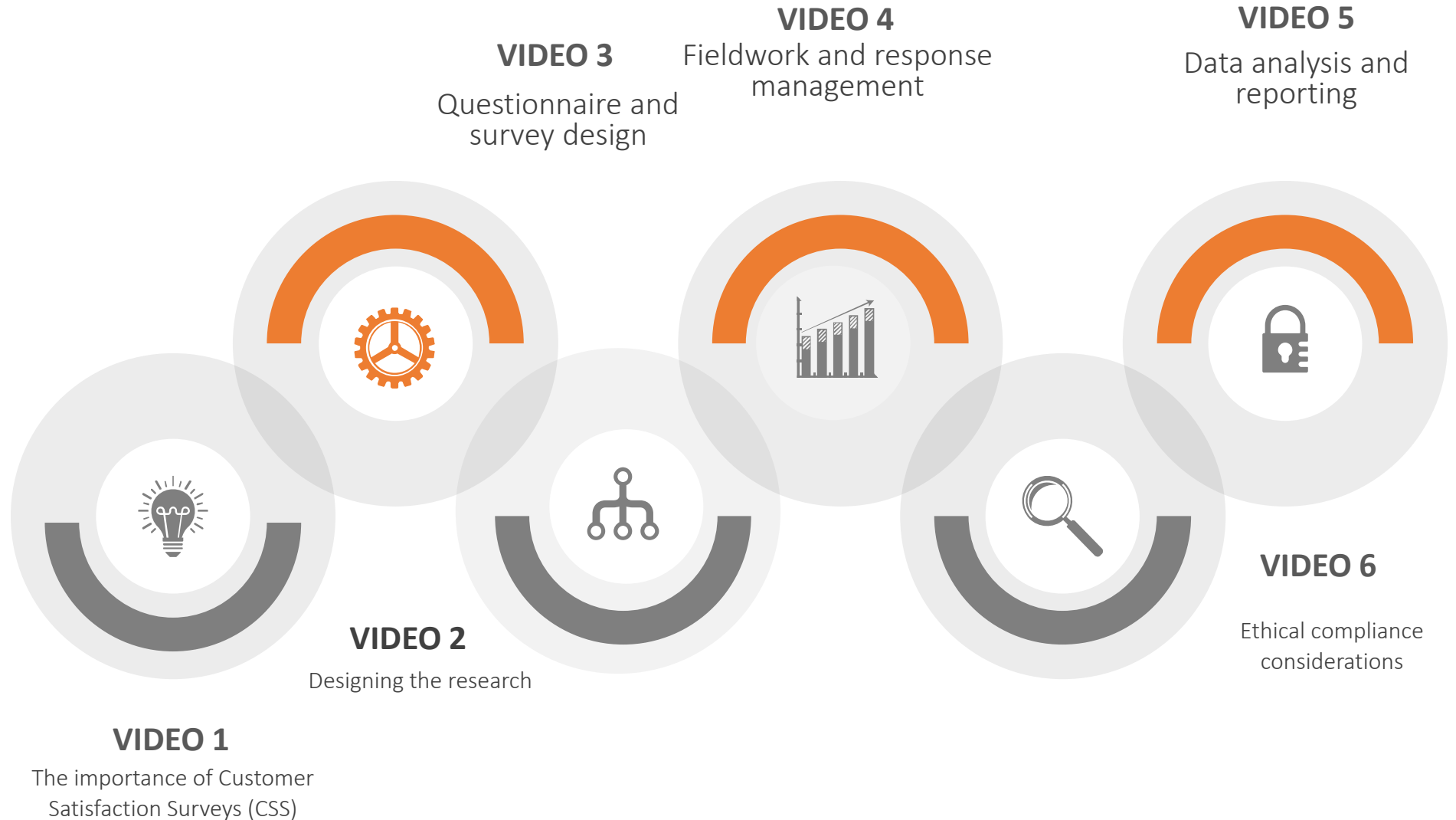


Telephone (survey or interview)

RECAP. Customer Satisfaction Survey Basics for NGOs: NCOSS Video Series

✓ What did we learn today?

✓ What will we learn next session?





Important last bits.

- ✓ Using 'Menti' to get feedback
- ✓ Questions?

Thank you for participating!

Queries to:
Rocellita@ncoss.org.au