Planning A Successful Survey

At any IT support organization, end user/customer satisfaction is a key indicator of success. Though customer satisfaction is easy to perceive, it is difficult to define and sometimes even more difficult to measure. But, it is necessary as part of an overall effective Service Level Management (SLM) process.

SLM acts as a guide for establishing good, sound business relationships. But before you can establish and maintain an effective SLM process, your IT organization must commit to a culture that promotes a business mindset, service orientation and continuous improvement. This is a key critical success factor.

One of the most important aspects of SLM is the benefit derived from the ongoing analysis and review of service delivery, and the communication between IT groups, and IT and its users/customers.

One way to assess service levels and obtain feedback is in the form of a survey. This involves implementing a reviewing, analysis and reporting process, and assigning accountability for continuous improvement.

The Service Level Management Process

What Is A Survey?

A survey may be called different things depending on its purpose: a poll, a questionnaire, an evaluator, an assessment, an inventory, or a survey. Throughout this article, all of these various forms are referred to as surveys.

A survey is a systematic, scientific, and impartial way of collecting information.
Techniques For Continuous Improvement

Many IT organizations are continuously tracking their improvement efforts by using surveys on a regular basis. Proper survey management should follow a clear, easy track in order to plan, create, administer, and analyze a survey and its responses.

The Deming PDCA (Plan-Do-Check-Act) method helps to easily move from the beginning planning stages of a survey through the development of action plans after the survey is over.

1. The Cycle begins with **PLAN**. Without adequate planning, your survey will be ineffective.

2. The next step in the Cycle is **DO**. This encompasses the actual design of the survey, selection of the sample, and collection of the data.

3. The next phase of the Cycle is the **CHECK** phase. This is the point where you analyze the data you have collected, draw conclusions, and report your findings.

4. The last phase of the Cycle is **ACT**. Here is where you determine the appropriate action steps to be taken in the light of the data.

Once the action steps are taken, the PDCA Cycle leads you back to **PLAN** another survey to evaluate the changes made.

The Cycle of Continuous Improvement is a project tracking system that helps you stay focused and always know where you are in the survey management process. It also consistently reminds you that the survey process is a **continuous process**.

More Information On Plan-Do-Check-Act

The concept of the PDCA Cycle was originally developed by Walter Shewhart, the pioneering statistician who developed statistical process control in the Bell Laboratories in the US during the 1930’s. It is often referred to as ‘the Shewhart Cycle’. It was taken up and promoted very effectively from the 1950s on by the famous Quality Management authority, W. Edwards Deming, and is consequently known by many as ‘The Deming Wheel’.

A Closer Look At Surveys & The PDCA Cycle

For your survey to accomplish its objectives it must be well-planned from the start. The following detailed checklist will help you in developing an effective plan. Not all these details need to be carried out on every survey. Adapt the list to suit your specific situation. For each of the following items, specify who is responsible and when that item is to be completed if you choose to use it in your survey project.
Plan

- Develop a list of survey objectives (expected outcomes)
- Develop a list of potential action steps reflecting the outcomes
- Develop a list of potential contingency steps reflecting changes in the action steps or outcomes
- Secure management's commitment and support
- Assign or nominate a project administrator/manager/coordinator
- Determine the survey delivery methods available
- Develop a projected budget for all of the survey costs
- Select members for a Survey Project Team
- Select Team members to help design and administer the survey

Do

- Develop a schedule for key dates of the survey project
- Decide what demographics are relevant to your survey
- Decide upon the survey sampling techniques
- Decide what topics are to be addressed in the survey
- Draft a cover letter to accompany the survey
- Review the audience list for integrity and enter it into a software application
- Determine the survey delivery methods you will employ based on your audience list
- Send letters to survey/interview respondents
- Print surveys and prepare to present them to the respondents
- Coordinate the administering of the surveys
- Retrieve returned surveys from the mail, disk, e-mail, web, etc.
- Enter or read data from the returned surveys into software

Check

- Analyze the data and develop a survey analysis report

Act

- Present the results to management with recommendations for improvement
- Present the feedback to respondents/audience
- Establish an action plan
- Establish a responsibility chart for action implementation and follow-up
Want To Learn More?

1. **Recommended reading:**
   - **Customer Surveying: A Guidebook for Service Managers**, by Dr. Fred Van Bennekom
   - **How To Conduct Your Own Survey**, by Priscilla Salant, Don A. Dillman
   - **The Survey Research Handbook**, by Pamela L. Alreck, Robert B. Settle

2. **Click below to get a demo of ATLAS** – Pink Elephant’s new ITIL Portal.

   Your own Pink consultant-in-a-box! ATLAS is a secure, web-enabled knowledge management system containing Pink’s highly valued intellectual property – ready and waiting for you to access, copy, customize and re-use. You get end-to-end access to expertise, data, tools, templates, communications and task support for IT service management best practice implementation projects.


3. **Attend Pink Elephant’s ITIL Implementation Road Map** at one of these locations:
   - Dallas, April 13 – 15, 2005
   - Minneapolis, May 4 – 6, 2005

   This unique two track workshop is delivered by Pink Elephant’s leading consultants and includes major sessions about how to plan and organize the implementation of ITIL’s SLM Process. Click here to view the detailed agenda, and a listing of all 2005 dates and locations:

4. **Attend Pink Elephant’s ITIL Case Studies Symposium**, which is being presented in San Francisco on **August 21 – 23, 2005**.

   Case studies galore! The program includes numerous case studies from real IT managers who have successfully undertaken the implementation of ITIL processes, including SLM. Click here to view more details:

5. **If you've already obtained Foundation Level Certification, take a giant leap forward and participate in the ITIL Service Manager Certification Program.** This is the most comprehensive, intensive and in-depth ITIL certification course.

   The program, which consists of seven modules including non-classroom assignments and three classroom sessions, will be presented next in **Toronto**:

   Orientation: May 20, 2005
   Classroom: June 13 – 17, 2005
   Classroom: July 11 – 15, 2005
   Exam: August 4 – 5, 2005

   Click here to view the detailed agenda, and other dates and locations: