

Golden Rules in Carrying Out Credit Union Survey

1. Make sure that every question explores only one aspect of the service of the member. Do not ask, “How would you rate the friendliness and efficiency of our staff?” – you might get a poor score and not know whether or both. Instead, ask about the both elements as separate questions.
2. Design questions so that you know how to interpret the score. Ask yourself, “What would I do with a high/low score on this question?” If there is no obvious action, then you need to rethink why you have included the question. Every answer should compel you to do something.
3. Do not have extreme questions of the kind ‘I am always extremely satisfied with . . .’ because no one will agree with this (nor organization is that great), and it will not distort the findings.
4. Make the questions as simple as possible.
5. Use as may ‘close-ended’ questions as possible. These are questions that for the member to respond using a point on a scale rather than writing in whatever they likes as an answer. Closed-ended questions are much easier to analyze.
6. Do not have too many questions. People quickly get bored. The longer it takes to complete the questionnaire, the more chance you have of getting ‘made up’ responses towards the end of it. Aim for a questionnaire that can be completed in 10 minutes or less.
7. Test the questions before you use them to make sure that what you think a question means is interpreted in the same way by members.
8. Ask the right questions of the right members. You will probably have different segments and you need to identify what characteristics within those segments you need to gather data about (age, sex, location and so on).
9. Develop report that describes the survey in plain English or language, whit lost of charts and pictures and as few numbers as possible.
10. Prepare senior managers in your credit union for the results.
11. Act on the information immediately.
12. Prepare a straightforward summary of the results that you can give to the front line. This should include findings of the survey, and the actions your credit union will take as a result.