

Creating Client Satisfaction Surveys for Projects

Neal Whitten, PMP

**The Neal Whitten Group
www.nealwhittengroup.com**

What you will take away from this session

- Identify the steps in creating and administering Client Satisfaction Surveys
- Takeaway templates and real-life sample Client Satisfaction Survey



Client satisfaction surveys

- Formal survey conducted throughout the life of the project and post project
- Not commonly utilized
- Missed opportunity
- Cannot know what client thinks about:
 - Your performance
 - Project's progress
 - Meeting their expectations
- Provide a primary project metric
- Part of overall business strategy



Example criteria to trigger surveys

- Any project with over one million US dollars in costs
- Projects which fall within the top 50% of expected revenue generators for the organization
- Projects where the client relationship is especially important to the organization's business
- Projects on the leading edge of technology
- Projects considered breaking ground in new business areas



Benefits of client satisfaction surveys

- Revealing the pulse of the client
- Identifying issues that require attention
- Improving client-relationship management
- Providing a satisfaction-related baseline
- Conducting a portion of the governance of the project
- Showing that you care about the client
- Setting bonus targets for project managers



What if I already have a good feel for my client's satisfaction?

- Unless you routinely survey your clients for feedback...
- Most project managers expect 75-95 percent satisfaction rating
- First survey conducted is almost always below 50 percent



7 steps in creating and administering a client satisfaction Survey

1. Establish the goals of the survey
2. Identify who should be interviewed
3. Identify how the interviews will be administered
4. Create the survey questions
5. Pre-test the survey
6. Administer the survey
7. Analyze and respond appropriately to the survey results



Project XYZ Client Satisfaction Survey

Thank you for taking the time to complete our Client Satisfaction Survey. The goal of the survey is to help measure client satisfaction with key project parameters. Please fill out your name and the date. For the multiple-choice questions, mark the number that best describes your answer. For the write-in questions, write your answer in the space reserved under the question.

Name: _____ Date: _____

1. Are you satisfied that you are sufficiently kept informed of project-related information important to you?

5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment

2. Are you satisfied with the client-provider relationship?

3. Are you satisfied with the product quality being produced?

4. Are you satisfied with the change control process?

5. Are you satisfied with the management of the budget?

6. Are you satisfied that regulatory issues are under control?

7. Are you satisfied with the success of the project to date?

8. What is your risk forecast in terms of achieving the final delivery date as it is currently scheduled?

3-Low risk, 2-Medium risk, 1-High risk, 0-No comment

Project XYZ Client Satisfaction Survey (Cont.)

9. What are your top three concerns?

10. What are your top three areas of satisfaction?

11. Any additional comments?

Bonus materials

1. Power Snippets: Client Satisfaction Surveys for Projects
2. Power Snippets: Creating and Administering Client Satisfaction Surveys for Projects
3. Real-life sample survey (shown on slides)
4. Sample Client Satisfaction Survey Questions
5. Sample Client Satisfaction Survey Questions – Post Project



CLIENT SATISFACTION SURVEYS FOR PROJECTS

Survey strategies for good business.

- ☑ **Client satisfaction should be a primary metric—if not the most important metric—to track to ensure that the right product is being built the right way.**
- ☑ Benefits of client satisfaction surveys include:
 - **Revealing the pulse of the client.** The more you understand the client’s expectations, the greater likelihood of either satisfying them or resetting them.
 - **Identifying issues that require attention.** Learn what is working well, what needs to be improved and what needs to change. Uncover issues before they fester out of control.
 - **Improving client-relationship management.** Help an organization or company retain clients, improve existing client relationships and build new client relationships.
 - **Providing a satisfaction-related baseline.** Measurements provide a basis for continuously improving client satisfaction.
 - **Conducting a portion of the governance of the project.** Surveys can support the project governance objectives.
 - **Showing that you care about the client.** Surveys are an important venue to demonstrate your commitment to excellence.
 - **Setting bonus targets for project managers.** If the survey data is consistent and viewed to be credible, it can be used to motivate project managers to continuously improve their performance and the performance of the project team. It can also offer a measurement of the project manager’s and the project team’s performance.
- ☑ As a project manager, if you do not routinely survey your clients for feedback, then you cannot really know what they think about your performance, the project’s progress, and whether or not you are meeting their expectations.
- ☑ **Do not bother to administer a survey if the results will not be appropriately analyzed and addressed. Don’t waste peoples’ time or create expectations that will not be satisfied.**
- ☑ **Surveys should provide a score that is both indicative of the client’s satisfaction and can be used as a baseline metric with which to compare future surveys.**
- ☑ **Surveys should be conducted at least quarterly for ongoing projects with serious consideration for being conducted monthly.**
- ☑ **Survey-related activities should be included in the project plan.**
- ☑ **Regardless of surveys being conducted throughout a project, there should be a post project client satisfaction survey after the project has completed.**
- ☑ Organizations should have a strategy to conduct surveys for projects that meet certain criteria.
- ☑ If you really care about your client, your performance and the project’s success, be bold enough to conduct surveys—all stakeholders win.
- ☑ **Experience shows that project managers who bother to conduct surveys are also project managers who are among the best performers and have the greatest potential in their careers.**
- ☑ If you owned the company, would you want your project managers conducting surveys to help improve the business? If your answer is “yes”—and it will be—then make it so.

“Ideas to help you become more successful.”

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This document is part of a Neal Whitten eLearning course called, “Surveying Client Satisfaction: Gauging Project Success” developed in collaboration with Velociteach®.

CREATING AND ADMINISTERING CLIENT SATISFACTION SURVEYS FOR PROJECTS

Listed here are the abbreviated fundamentals in creating and administering client satisfaction surveys.

- ☑ The seven steps in creating and administering a client satisfaction survey are: (1) Establish the goals of the survey; (2) Identify who should be interviewed; (3) Identify how the interviews will be administered; (4) Create the survey questions; (5) Pre-test the survey; (6) Administer the survey; and (7) Analyze and respond appropriately to the survey results.
- ☑ There are several likely options that can be used to identify the method used to administer a survey: In-person interviews; Telephone surveys; Web page survey tools; and Email surveys.
- ☑ Begin the survey with a short introductory paragraph welcoming the survey taker, clearly stating the goals of the survey, and providing the survey instructions.
- ☑ **Keep the questions short, concise and easy to understand.**
- ☑ **Make sure the questions provide you with the data you need.**
- ☑ Only include questions that yield data with which you have a need to know.
- ☑ Ask questions in a neutral way; don't lead the responder in a particular direction.
- ☑ For questions with multiple choice answers from which to select, consider if another option should be included such as "other," "no comment," "don't know" or "not applicable."
- ☑ **There are two basic types of questions: multiple choice and write-in. With multiple choice questions, you are given a set of choices and you are asked to select the choice that best answers the question. Write-in questions require you to respond with written text to a question. Multiple choice questions are necessary to arrive at a score. Write-in questions are necessary to learn how the responder really feels; his thoughts and ideas.**
- ☑ **Make most of the survey questions multiple choice.**
- ☑ Create surveys that yield a score so you can establish a baseline score for future reference. You want to be able to show whether or not improvement is occurring from survey to survey.
- ☑ In response to a question, have the multiple choice options listed from most positive (on left) to most negative (on right). For example: 5-Strongly agree, 4-Agree, 3-Neither agree nor disagree, 2-Disagree, 1-Strongly disagree, 0-Not applicable.
- ☑ A higher-numbered value should mean a more positive answer. For example, on a scale from 1 to 5, 5 is the most positive result.
- ☑ Avoid technical terms or acronyms unless you can be sure your audience fully understands them.
- ☑ Make sure enough space is available for write-in answers.
- ☑ **Leave space at the end of the questionnaire for "Other comments." This field has been shown to be exceptionally valuable for learning information that would otherwise have been overlooked.**

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CREATING AND ADMINISTERING CLIENT SATISFACTION SURVEYS FOR PROJECTS (cont.)

- ☑ **The survey should err on the side of being too short rather than too long. Many projects should be able to meet their survey goals within 7-12 questions.**
- ☑ Pre-test the survey with several test subjects to ensure the survey achieves its goals. This is also a good time to ensure the clarity of the introduction and questions, make sure the questions are presented professionally, and ensure there is no grammar or spelling errors. Then collectively meet afterwards with the pre-testers to discuss any findings. You will be thankful for the dry run.
- ☑ **The project sponsor or the project's legal counsel should review the client satisfaction survey before it is administered.**
- ☑ Before you distribute the survey, let the survey takers know in advance that the survey is coming, provide an overview of the goals for the survey, how much time will be available to complete and return the survey, and what the survey takers can expect after the survey results have been returned and studied.
- ☑ Make sure the survey is not distributed at an unusually awkward or inconvenient time. Examples could be if the principle survey takers are away from the office, it's a hectic time of the month or quarter, or some other crunch event is contending for the time of the survey takers.
- ☑ Survey takers should have up to three days to complete most web- or email-based surveys.
- ☑ Common reasons why survey takers do not complete the survey on time include:
 - Other day-to-day work-load issues receive higher priority
 - Survey is too long or requires too much effort to complete
 - Survey takers view that survey results will not receive the appropriate attention
 - Survey takers have been coerced to respond with favorable ratings and comments
- ☑ The project manager needs to carefully look over the survey data results from each question. Then decide how best to interpret and use the data for the good of the project and the client-provider relationship. The client has spoken and his opinions should be respected and carefully considered.
- ☑ **Create a plan to appropriately address the survey results.**
- ☑ **The project manager should consider reviewing the findings and follow-on actions with a trusted colleague such as the project sponsor or individuals from the project team before presenting the information to the client. Adding this step improves preparation for potential client questions and concerns.**
- ☑ **If a survey comes back negative, view this as an important moment to show commitment to improvement while working close with the client on appropriate action plans.**
- ☑ It is crucial that the client feels that she has been treated with respect and that the client-provider relationship continues to strengthen with each successive survey.

Note: Some of these tips were found on or inspired by The Survey System website at www.surveysystem.com/sdesign.htm.

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Project XYZ Client Satisfaction Survey

*This document is part of a Neal Whitten online course called “Surveying Client Satisfaction: Gauging Project Success” developed in collaboration with Velociteach®. This document is an example of a real-life survey—minus this paragraph. **You are free to make modifications to accommodate your project.** This survey is intended to be used during a project; not after it has been completed.*

Thank you for taking the time to complete our Client Satisfaction Survey. The goal of the survey is to help measure client satisfaction with key project parameters. Please fill out your name and the date. For the multiple choice questions, mark the number that best describes your answer. For the write-in questions, write your answer in the space reserved under the question.

Name: _____ Date: _____

1. Are you satisfied that you are sufficiently kept informed of project-related information important to you?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
2. Are you satisfied with the client-provider relationship?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
3. Are you satisfied with the product quality being produced?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
4. Are you satisfied with the change control process?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
5. Are you satisfied with the management of the budget?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
6. Are you satisfied that regulatory issues are under control?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
7. Are you satisfied with the success of the project to date?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
8. What is your risk forecast in terms of achieving the final delivery date as it is currently scheduled?
3-Low risk, 2-Medium risk, 1-High risk, 0-No comment

9. What are your top three concerns?

10. What are your top three areas of satisfaction?

11. Any additional comments?

Sample Client Satisfaction Survey Questions

This document is part of a Neal Whitten online course called “Surveying Client Satisfaction: Gauging Project Success” developed in collaboration with Velociteach®.

This document lists sample questions that you can choose to include in a Client Satisfaction Survey that is conducted during a project. **You are free to modify the questions to best suit your needs.** Space has been included under each question that you can use to modify that question. Space has also been included after the questions that you can use for creating additional questions. A companion document, called “Project XYZ Client Satisfaction Survey,” shows a real-life survey derived from these sample questions.

1. Are you satisfied that lessons learned from past projects have sufficiently been applied?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment

2. Are you satisfied that you are sufficiently kept informed of project-related information important to you?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment

3. Are you satisfied with the timeliness of problem reporting and resolution?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment

4. Are you satisfied with the client-provider relationship?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment

5. Are you satisfied that the product requirements are complete?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment

6. Are you satisfied that the specifications are being met?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment

7. Does the project manager promote good relations among stakeholders?
5-Always; 4-Almost always; 3-Sometimes; 2-Seldom; 1-Never; 0-No comment

8. Are you satisfied with the skills of the project members?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment

9. Are you satisfied with the project management practices followed?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment

10. Are you satisfied with the product quality being produced?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment

11. Are you satisfied that commitments are being met?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment

12. Are you satisfied with the change control process?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment

13. Are you satisfied with the management of the budget?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment

14. Are you satisfied with the application of Earned Value Management?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment

15. Are you satisfied that legal issues are under control?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment

16. Are you satisfied that regulatory issues are under control?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment

17. Are you satisfied with the success of the project to date?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment

18. What is your overall satisfaction with the project?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment

19. What is your risk forecast in terms of achieving the next major milestone as it is currently scheduled?
3-Low risk, 2-Medium risk, 1-High risk, 0-No comment

20. What is your risk forecast in terms of achieving the final delivery date as it is currently scheduled?
3-Low risk, 2-Medium risk, 1-High risk, 0-No comment

21. What are your top three concerns?

22. What are your top three areas of satisfaction?

23. Any additional comments?

Additional Questions

You can use the space below to record additional questions you would like to include in the survey.

1.

2.

3.

4.

5.

6. _____

7. _____

8. _____

9. _____

10. _____

11. _____

12. _____

13. _____

14. _____

Sample Client Satisfaction Survey Questions – Post Project

This document is part of a Neal Whitten online course called “Surveying Client Satisfaction: Gauging Project Success” developed in collaboration with Velociteach®.

This document lists sample questions that you can choose to include in a Client Satisfaction Survey that is conducted *after* a project has completed. **You are free to modify the questions to best suit your needs.**

Don't forget to add a short introductory paragraph for the survey. Also, consider adding space under each question so that the client can further comment on the question being asked.

1. Were you satisfied that lessons learned from past projects had been sufficiently applied?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
2. Were you satisfied that you were sufficiently kept informed of project-related information important to you?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
3. Were you satisfied with your level of involvement on the project?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
4. Were you satisfied with the timeliness of problem reporting and resolution?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
5. Were you satisfied with the client-provider relationship?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
6. Were you satisfied with the overall performance of the project manager?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
7. Were you satisfied that the product requirements were complete?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
8. Were you satisfied that the specifications were appropriately met?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
9. Were you satisfied with the completeness and accuracy of the initial project plan?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
10. Were you satisfied with the planning that went into the overall project?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
11. Did the project manager promote good relations among stakeholders?
5-Always; 4-Almost always; 3-Sometimes; 2-Seldom; 1-Never; 0-No comment

12. Were you satisfied with the rate of staffing?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
13. Were you satisfied with the skills of the project members?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
14. Were you satisfied with the project management practices followed?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
15. Were you satisfied with the quality of the product or services produced?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
16. Were you satisfied with the change management process?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
17. Were you satisfied with the identification and management of risks?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
18. Were you satisfied with the management of the budget?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
19. Were you satisfied with the application of Earned Value Management?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
20. Were you satisfied that legal issues were appropriately addressed?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
21. Were you satisfied that regulatory issues were appropriately addressed?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
22. Were you satisfied with the training that occurred?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
23. Were you satisfied with the handover of the product or services?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
24. What is your overall satisfaction with the project?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
25. What were your top three most difficult issues on the project?
26. What were your top three most satisfying areas of the project?
27. How satisfied were you with the product/service provider that you would recommend them to other clients?
5-Very satisfied, 4-Satisfied, 3-Neutral, 2-Dissatisfied, 1-Very dissatisfied, 0-No comment
28. Any additional comments?

Closing thoughts

- Access PDF PowerPoint slides and other five handouts here: nealwhittengroup.com/surveys/
- If you really care about your client, your performance and the success of your project—and I know you do—dare to be bold enough to conduct client satisfaction surveys
- The best PMs...
- If you owned the company, would you want Client Satisfaction Surveys...?

