
CLIENT SURVEY TEMPLATE

TIPS FOR A SUCCESSFUL SURVEY

- A lot of testing and research has gone into how survey questions and answer options are worded and sequenced. To get the most useful feedback data, it's best not to re-write or re-order them.
- Don't worry, there are options to customize most questions to fit your context. Text that is shown in brackets << >> is customizable, but if you change text outside of brackets, you will lose access to benchmarked data.
- Questions are not required for respondents; they can opt out of answering any question.

CONFIGURING SURVEY TITLE AND INTRODUCTORY TEXT

- Make sure to rename the survey before administering it. Consider using a title that's both engaging and relevant to your clients. It also helps to include your organization/program name.
- In the survey's introduction, briefly explain the purpose of the survey and describe how your organization will handle the feedback it receives. Example below.
- To get the most honest feedback, anonymous surveys have proven the most effective, but if you want to take a different approach, make sure to explain in the survey's introduction.

<< This is an opportunity for you to honestly tell us how we are doing as an organization and how we might do better. Your responses to this survey will be anonymous. Nothing you say in this survey will affect your ability to participate in this organization's services in any way. Thank you for your feedback! >>



CONFIGURING NET PROMOTER SYSTEM / Q1-Q3

- Responses to questions 1-3 will give you a sense of how satisfied clients are with their overall experience.
- Question 1 is benchmarked, meaning you'll be able to compare your survey results to the results of similar organizations.
- Replace << **this organization** >> with your organization or program name.
- Customize question 1 by choosing option a, b, or c. If you choose option c, limit the language you include to 140 characters or fewer.

1. How likely is it that you would recommend << **this organization** >> to << CUSTOMIZE WITH OPTION BELOW >>?
- a. a friend or family member
 - b. a friend or family member who is in a similar situation to you
 - c. a friend or family member who needed <<Y>>

Not at all likely											Extremely likely
0	1	2	3	4	5	6	7	8	9	10	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. What is << **this organization** >> good at?

3. What could << **this organization** >> do better?

CONFIGURING EXPERIENCE QUESTIONS / Q4-Q9

- Questions 4-9 give you insight into how clients experience your program/organization.
- Questions 4-5 are benchmarked. You can customize question 5 if those who interact with clients aren't called "staff" (e.g., advisors, case managers, volunteers, etc.).
- Questions 6-9 are not benchmarked. If they aren't relevant to your organization or program, feel free to leave them out.
- Answer options to question 9 can't be changed, but if different answer options are needed, you can delete question 9 entirely and create a custom question instead.

4. Overall, how well has << **this organization** >> met your needs?

- Not well at all
- A little bit
- Fairly well
- Very well
- Extremely well

5. How often << **do staff at this organization** >> treat you with respect?

- Never
- Rarely
- Sometimes
- Usually
- Always

6. How easy is it for you to get services at << **this organization** >>?

- Not at all easy
- A little bit easy
- Fairly easy
- Very easy
- Extremely easy

7. Please explain your answer.



8. How connected do you feel to << CUSTOMIZE WITH OPTION BELOW >> at << this organization >>?
- a. other participants [may be customized to suit your program model: e.g., “peers,” “cohort,” “other students”]
 - b. staff [may be customized to suit your program model: e.g., “your mentor,” “your case manager,” “adults”]
- Not at all connected
 - A little bit connected
 - Fairly connected
 - Very connected
 - Extremely connected
9. How often do you interact with << this organization >>?
- Every day
 - A few times a week
 - A few times a month
 - Once a month
 - Once every few months
 - Less often than that

CONFIGURING CUSTOM QUESTIONS

- You can add up to 12 custom questions to this survey. They should be inserted before the final demographics section. Remember, though, you want to keep the survey short.
- You can use multiple choice (choose one answer), checkboxes (check all that apply), or open ended (free-form) questions. There are no matrices or ranked order questions available right now.
- For answer options, try using similar options or rating scales you’ve seen in other parts of the L4G survey.

<<< INSERT CUSTOM QUESTIONS OR DELETE SECTION >>>

CONFIGURING DEMOGRAPHIC QUESTIONS / Q10-Q12

- These questions are useful for making sure you have a representative sample of clients and for segmenting results in your analysis of the feedback.
- You can customize the answer options if they're not relevant to your clients.
- If you need to add an additional demographic-oriented question, you can use one of your custom questions for that purpose.

The following optional and confidential questions help us understand who we serve and how we can support you. Please find the options that are the best fit for you or please self-describe.

10. What is your age?

- 17 years or younger
- 18 - 24 years
- 25 - 34 years
- 35 - 44 years
- 45 - 54 years
- 55 - 64 years
- 65 - 74 years
- 75 years or older

11. Gender: How do you identify?

- Man
- Non-binary
- Woman
- Prefer to self-describe, below

Self-describe:_____

12. Race/Ethnicity: How do you identify? (Check all that apply)

- Asian or Asian American
- Black or African American
- Hispanic or Latino/a/x
- Middle Eastern or North African
- Native American or Alaska Native
- Native Hawaiian or other Pacific Islander
- White
- Another race or ethnicity, please describe below

Self-describe:_____