Webinar: Practical Strategies for Collecting and Incorporating Client Feedback Data

October 5, 2023, 2:00 – 3:00 PM ET

Transcript

Introduction

Sally Beiruti: Alright. Welcome, everyone. Thank you all for joining us today on our training on practical strategies for collecting and incorporating client feedback data. The training is presented to you by Switchboard. Switchboard is a one-stop resource hub for refugee service providers in the United States. My name is Sally. I'm the Program Manager for Monitoring and Evaluation at Switchboard.

Zoom Orientation

SB: So on the next slide, we have a quick overview of Zoom webinar tips. So this is a Zoom webinar, so you're joining in on listen-only mode. So due to the large number of learners on today's webinar, we've disabled the chat box. However, you do have the option to send in messages to the speakers and co-facilitators via the Q&A box. So keep an eye on the chat for any messages from Switchboard and links to various resources that we'll be mentioning.

SB: Today's webinar will run for 60 minutes and is being recorded. You'll receive an email within 24 hours that includes the recording slides and recommended resources. The webinar transcript along with the recording will also be posted on the Switchboard website within a few days. Lastly, we ask that you kindly complete our webinar satisfaction survey at the conclusion of our session. It's just a short, three-question survey, and it helps us here at Switchboard continuously improve our training and technical assistance offerings to you all.

Today's Speakers

SB: Alright, and with that, I'm delighted to introduce our speakers today. So first, Robert Reynoso serves as the Qualitative Data Officer at the International Rescue Committee, IRC, supporting the work of the Resettlement, Asylum, and Integration Department. Robert is a generation 1.5 Dominican American with diverse experience across education, health, research consulting, and international criminal justice. These experiences are braided together by the desire to help resilient communities through inclusive and culturally adept research, analysis, and data-driven practices. Robert holds a bachelor's degree in forensic psychology, a master's degree in social organization psychology, and a master's degree in sociology.

SB: Our second speaker is Adedoyin Celia Ojo, who serves as the Client Engagement Program Officer at IRC, where she supports Resettlement, Asylum, and Integration offices to establish and maintain feedback collection strategies that promote client-centered programming. She brings over seven years of experience working in government and non-governmental international organizations, including UNHCR and Plan International, to implement projects for refugees and other vulnerable populations across West Africa and

Europe. She holds a master's degree in humanitarian and refugee studies from the University of Ibadan, Nigeria, and a diploma in humanitarian assistance from the Liverpool School of Tropical Medicine in the UK.

SB: And so with that, I'm going to pass it on to Robert to share the learning objectives.

Learning Objectives

Robert Reynoso: Thank you very much, Sally. So I'm going to share the learning objectives for today's presentation, today's webinar. And by the end of this session, you'll be able to, one, describe why collecting and using client feedback data is essential for effective services; two, compare feedback data collection approaches, including two-way communication strategies; and, three, identify ways to use client feedback to improve services and close the feedback loop.

Poll Questions

RR: And before we dive into that, I kindly ask that you open a new tab, browser, or your cell phone or tablet, and log into the Slido. I have a few questions for you before we actually get into the content. And so you can scan the QR code that's on the screen. You can also go to slido.com and enter 2962992.

RR: So the first question that we have for you is,

The last time I was very happy with a service, I...

RR: ... thanked the service provider in person, and you have all these different options. So, okay. Wrote a public review and said kind things; thanked the service provider in person by phone or by note; recommended the service to family, friends, or colleagues.

RR: So as they're pouring in, I'm going to try to read them. It's very active, the chat. So you have filled out a survey and spoken well with all of the providers by name. Recommended the service to family, friends or colleagues. It seems that "thank the service provider in person, by phone or by note" is currently leading. This is not a race, but just kind of pointing this out. And just a few more seconds and then the next question actually.

The last time I was very unhappy with a service, I...

RR: ... and similar options. Stopped using the service. Okay, right away. Okay. I similarly told my friends and families or colleagues to stay away, asked to speak to his manager. Okay, wow. Very strong. "Stopped using the service" seems to be in the lead at this time, and give a few more seconds as responses come in. All right. So, stopped using the service. "Told my family and friends or colleagues to stay away" is the second one. Okay. And wrote a strongly worded client feedback. Alright, thank you very much. And I'm going to pass it back to my colleague, Celia.

Adedoyin Celia Ojo: Thank you, Robert. Thank you for that very insightful icebreaker. I see how appreciative we have feedback, we as clients, and now we're talking about feedback from our clients, so this is very helpful. So, I really want to say that, before I proceed with the presentation, I want to ask you to please keep your phones handy as this is going to be a very, very interactive session. It's going to be a two-way communication. It's going to be about collecting feedback because this is what the presentation is about. So please, there's going to be more Slidos coming your way and we really appreciate your contribution and participation.

1. Why Collect Client Feedback?

AO: So why are we talking about client feedback collection? Feedback collection and clients are usually the most spoken words when we look at our services that we provide to our clients, and because it's very important to help us direct the path that we take our services to and to also hear from our client how we are performing in terms of the services we're providing to them. So this is an essential part of the work we do as resettlement service providers, and it's very important that we talk about it and learn what we know about already.

What is Client Feedback?

AO: So, what is client feedback? It's the information, insights, input, and everything we get from our clients that they share about the experiences they have with our organization. It allows them to provide feedback as part of influencing over programs and decisions that impact their lives because they're the ones receiving the service. So it's very, very important we hear from them, we get their take, we get their input, and we give them a sense of ownership.

Value of Client Feedback

AO: In the next slide, we talk more about the values that this brings to us as an organization and also to the client. The most important and first [thing] that I would like to mention is it empowers our client. It gives them the sense of ownership that, yes, this service that is being provided to me was actually because I was asked what I wanted. I was asked what I needed. So it's very important for us to always put it at the back of our mind to give a sense of ownership by empowering our client.

AO: It builds trust because these services we provide, it requires a very, very high level of trust from our clients for them to even accept the services we're providing to them, so it helps. Collecting their feedback properly, their input and insight into program design, builds that trust and strengthens it.

AO: Then it also helps us to communicate our project or program results and quality. So I would like to say that the feedback process is a continuous process. So in order for us to continue to improve on the services we're providing to our clients, it's very important that we get their input, we know what is working and what is not. There's a quote attributed to Albert Einstein that says, “Insanity is doing the same thing over and over again and expecting a different result.” So it's very important we periodically hear from our clients to know how what we're doing is going. It doesn't necessarily mean we want to hear that it's going bad, but it's good for us to hear whether it's going good or bad so that we know where to improve. So it's a continuous improvement.

AO: And by saying that, also it helps us to improve our services. And of course it also helps us to meet our funder’s requirement in order for us to get funding and to keep them up to date as to how our clients are enjoying or benefiting [from] the services we're providing to them. So it's very important that in the loop of things, there's the feedback collection that is periodically and constantly being collected from clients.

Discussion Question

AO: I had mentioned earlier that this is an interactive section and there's a whole lot of Slidos coming. So with this introduction, I would like to ask a few questions from you to get like a temperature feel of where we are with… the services we're providing to our clients, how often we're collecting client feedback. So the first question is,

How are you collecting client feedback in your project?

AO: So like Robert said, it's not always we just want to… [chuckle]. The options are there. We want to see what to do. I see surveys coming in, good, listening sessions, surveys, pre and post surveys, developing a new process surveys. Yeah, surveys or having interviews, written surveys, participant advisory groups, utilizing surveys, phone call tracking, anonymous survey, hearing their experiences. Advisory council is coming in after surveys, client surveys, interviews. Yes. This is very delightful to see that there are actually processes and techniques and strategies we have in place already. Thank you, thank you for sharing this.

Poll Question

Are you proactive or reactive in collecting client feedback in your program?

AO: Now the next question is, I already see the response, but I really just want to also explain what we mean by “proactive” and “reactive.” So proactive feedback is when we reach out to our clients to hear their thoughts, input, satisfaction, dissatisfaction level before they reach out to us. That's being proactive. That's putting the services there before the clients even think there's a need to want to reach us. And then reactive is when we are reacting to what they have already said, and most of the time, this doesn't come in a good way. It's usually in [the] form of complaints, grievances, and all of that. So what we are aiming to achieve is to be proactive, to be the one to go to them before they come to us.

AO: I always say that no news is not good news when it comes to clients. It's always good to hear from them. When clients are quiet, that's not good. So we want to be proactive, and I can see here that proactive is leading the day. I'm very, very happy about that. And then there's reactive. Yes. So that happens at times, but what we really want to achieve is to be proactive in our feedback collection. Thank you.

Poll Question

AO: And then the last question on this set of Slidos is,

Do you follow up with clients after they provide feedback?

AO: After they take their time to tell you how they feel, do you follow up with them? Sometimes, always, never. My goodness, I didn't expect to see “never,” but that happens. So thank you for being honest. Yes, always, sometimes. I like that. Sometimes it's within winning the race even though I would be more happy if it was never, if it was always rather, and never to say never, but there's never here. Thank you, thank you, thank you for sharing this with me.

The Client Feedback Process

AO: So with that, I'll go to the next section of the presentation, which talks about the feedback process. So from the responses we've seen, I can see that we are not new to feedback collection and we are already doing that in our programs and projects. Be it reactively or proactively, we're already doing it, and that's a good thing.

AO: So the next step is to really talk about the feedback process. So it's one thing to have feedback in place, it's another thing to follow the process. It's a continuous circle. It's an iteration if we can use that. We use what we get from the feedback to develop our program, to improve our program, and then ask for feedback again. So it's very continuous, and it's something that should always be an element of our work.

AO: So the first step in the feedback process, which many of us I believe are already aware of, is to gather the feedback, to gather the feedback through surveys, to gather the feedback through interviews, to hear from our clients. It's very, very important, and most of the time we put that in place. So we do this because we want to hear from our client, we want to use their input to make our services better.

AO: The second step is to analyze the feedback, and this is very, very important. It goes beyond just asking clients to supply us with information and taking the data. What do we do with it? It's very important to analyze after we collect the data. We shouldn't just tick a box to say, "Yes, we've gathered the information. Yes, we've gotten the feedback." What are we going to do with it? The next step is to analyze. There's going to be as many feedback as we have clients. So there's a need to look into it critically. Look for the trends, set priorities, look at what we can put in place, look at what we have to say no to. It's very important to analyze. This step sometimes we don't follow through. So I'm saying it today, I'm bringing it back to your attention that it's a very, very important step that has to be followed through once you decide to embark on the feedback collection strategy.

AO: And then after that, we take action. So I'd already mentioned we analyze the feedback, we look for the trends. From the trends, we decide on the priorities we want to take action on. This step is also very important because analysis without action is really nothing. So it's very important to analyze and decide what we want to do. Sometimes the actions are right there in our front, and we can just implement them. Sometimes it takes a longer process. Sometimes we can't even implement some of these requests or these actions that we have identified because of our policy as an organization, because it's not the right thing to do. But it's very important to analyze and decide on what actions needs to be taken.

AO: And then the last part is to follow up with clients. This part, I'm going to dedicate a whole section to it because in as much as it's there in the feedback process, it is a very, very, very, very important step, but it's often neglected. It's often taken out of the equation. So many times, we gather the feedback, we analyze it, we take action, and then nothing happens. Nobody follows up with the client. Nobody tells the client this is what we have done. And this also affects our work, because sometimes we've done so much to put into place what the clients have demanded or asked for, but then nothing is happening because clients don't even know the services have been provided. So we're going to talk more on following up with clients.

During Data Collection, Only Gather the Data You Need

AO: But on the next slide, I would also reflect on some things we have to put in place. So we've talked about the feedback process, but the feedback process in itself cannot just play out if we don't put some considerations into place. And some of the considerations are, during the data collection, we should only gather the data that we need. This is very important because it reduces our analysis work. If we know the reason why we're collecting the data, we should be able to devise the kind of data that we need to answer those questions that we want to provide answers to. So ask [for] the information that [is] useful to the project. Yes, it's good to know your demographics and things like that, but it's very important to streamline your questions so that, number one, it doesn't get boring to the client.

AO: Number two, they don't see it as over-survey[ing]. Like, someone just asked me for my gender and name last week. Why are you asking that again? So it's very important to streamline the questions we are asking. Plan how to use it. If we know what we want to do with the data, then that will guide us on knowing the questions we want to ask, because it's very important for all these processes to be in place for us in order for us to have a successful feedback collection. That continues on the next slide.

AO: Other consideration that we should put in place, which is, clients, every opportunity we have to collect clients feedback, we should maximize it. We should respect our clients, [be] mindful of their time and contribution, mindful of the things they could have been doing for that 30 minutes, but they decided to come answer our survey or answer our interview questions.

Obtain Meaningful Informed Consent

AO: So it's very important to also treat them with dignity, put in place all the things that protect and respect their rights, explain to them the purpose of the data collection. Don't just throw some form to them or just call them and just say, "I'm calling from this organization. How was the service we provided?" Explain to them. Let them know why you're calling. Let them know what it is going to be used for. Share their rights. Tell them, “The fact that we're asking you this question does not affect your rights in any way. It doesn't mean if you have given us a negative comment, it's going to affect the services we're providing.”

AO: All of these considerations have to be stated plain and clear to the client because, as I mentioned earlier, we are building trust with them and treating them with dignity. And explaining all of these procedures and processes to them is very important in building that trust that we're trying to build.

AO: Also be mindful of cultural, language, literacy, and all other considerations. Be mindful of whether you can shake [their hand], whether you can ask them their name, whether you can call them by their first name. Just be mindful of these cultural considerations, because sometimes they can make or mar the feedback collection process. Once you start on the wrong foot, the rest of the information you're getting might as well be useless because you have not built the kind of rapport that you should build with them. So it's very important to put all of these things in our thought process as we go out to collect feedback from our clients.

Safeguard Client Data

AO: Lastly, I'd like to talk about safeguarding the client data, because this is also very important. After telling them about their rights and all of that, we should also safeguard the information that we're getting from them. So on the next slide, there's more explanation on the safeguarding of clients’ data. This means that it should be secured physically, electronically. We should know who has access to it or who doesn't. It should really, really be protected because this is information about people's lives you're getting. So it's very important you treat it with utmost confidentiality. And if applicable, do not move from one office to the other. Make it as stable as possible where it should be housed so that at the end of the day, a client just doesn't go on the street or on the newspaper and they see their information. They're wondering, “How did this get here?” So it's very important to put all of these things into consideration.

Knowledge Check

AO: And with that, I'm going to ask you another question. You have been forewarned that this is going to be an interactive section, so I really want to carry you along and see where we are together as a group.

AO: So this next question, it's really just to check your knowledge about what we've talked about already. And it is,

What are the four steps of the client feedback process?

AO: If you can please write them haphazardly, or you can write them in sequence. I just want to see how familiar we are with the process that we have just mentioned. I know this might take a little bit of time, but I'm really eager to see who follows the sequence.

AO: Gather feedback, analyze feedback, take action, follow up. Gather, analyze, act, follow up. Gather, analyze. Yeah, that's almost forming a rhythm. I like that, I like that. Yes, collect, analyze, follow up with clients. I like that everybody is including the “follow up with clients.” I'm really looking out for that, because sometimes that is totally left out. So it's very, very important. Thank you, thank you. Yeah, you all have first mark. Yeah.

2. Approaches to Feedback Data Collection

AO: So the next step is, we've talked about the process, we've talked about why we're collecting data, we've talked about the approaches and considerations we need to put in place. But now we want to look into the different feedback data collection strategies, tools, or mechanisms. You can call them any one of the above.

AO: So in collecting client feedback, it's very, very important to also put into consideration that it is a two-way communication we're trying to create. So it's very important to know that whatever approach we decide to use, it has to make room for a two-way communication. What do I mean by this? We're able to talk to the clients, and the clients are able to talk to us. One-way communication is non-directional. The effort will be lost because it's just like a power struggle, like a power play. You are the one telling them everything and you're not hearing from them. So whatever approach or tool we decide to look into, it has to put into consideration a two-way approach.

Feedback Collection Tools

AO: And here, I like to represent this as an arrow, and the reason I'm doing this is so that we know that no matter where we are, no matter what resources we have, we can always implement client feedback collection. So on one hand, we have the very traditional approach of feedback survey suggestion boxes, which just allows clients to write or answer very, very close-ended questions. With this, we can do it over the phone. A survey, we can do it over the email, SurveyMonkey, all sort of platforms that are cheap. We don't necessarily have to say, oh, because we want to do client feedback, we have to wait for elaborate actions and planning. With whatever we have, we can do a form of client feedback that is effective, that is data-driven, that is two-way. So on the end of the spectrum, we have suggestion boxes and client feedback surveys, like I've mentioned.

AO: Now, moving back to the high resources end is the more participatory approach. With this one, we just don't want to hear about client satisfaction or dissatisfaction. We want client input. We want to hear from them, "Yes, you said no to this question. Why did you say no? Okay, you have said no. What do you think we can put in place to make it a yes?" We want their participation. We want them to help us build up the program that they're going to benefit from together with us. So on this end of the spectrum, we have a focus group discussion. For focus group discussions, we can talk more about a particular program. So, for example, let's say we have an education program in our office and we've been running it year in, year out, but we want to know how that program has been beneficial to our clients. So we decide, okay, everybody on this program, we want to have a focus group discussion. Tell us about this program, tell us the barriers, challenges, what you like about the program through a focus group discussion. This could also take place [in] town hall meetings.

Low-, Medium-, and High-Resource Feedback Tools

AO: So with that, we get more in-depth into the program itself. Now, on the next slide, I explain more about the low resources like I've talked about, and then the next slide is the middle resource strategies, which talks about focus group discussions, in-depth interviews, and all of that. Needs assessment, needs assessments are very important because it just helps us assess the situation, like what are the immediate needs? What do you need us to put in place? Workshops, town halls, focus groups, all of those aim at the same thing: understanding a particular program, a particular strategy, a particular project. Now, the last on the spectrum are the high-resource strategies and tools. These ones are like totally participatory. This is when you get the client's input. This is where you talk to them like they are partners. They're not clients anymore. They're your partners. They're helping you decide what to put in place.

AO: So on the next slide, we have client advisory councils. We have participatory design approaches. Now, client advisory council is a bit different from what I described earlier with focus group. With focus group, we're focusing on a particular program, a particular set of people. The client advisory council, the clients are becoming our partners. We're giving them that ownership to help make decisions that influence their lives. So this will cross across different nationalities, different groups, genders, literacy, languages, and all of that. You're bringing everybody together so that everybody voices out what they think would make the program work together for everybody.

AO: So this is a very, very good example of participatory approach of client feedback, and it usually results in program design, program improvement based on clients' recommendations themselves. So, for example, if you have decided to implement your program in a certain way, and now you're speaking with the clients and the clients are saying, "Do you know why we don't even come for that event you organize every year? Because you're doing it this way, you're doing it on a Monday. We don't work on Mondays," and things like that. So they give you example of why they are not attending your program and what you can put in place. So this helps you to develop your programs better. And also having gone through all these processes, strategies, tools, and mechanisms, it's important, like I mentioned earlier, to make sure there's room for a two-way communication. You're hearing from the client, and the clients are hearing from you.

AO: And then it's also very, very important as an organization to take advantage of whatever tool you put in place to standardize it so that you don't keep reinventing the wheel. So, for example, whatever approach you decide to use, be it survey, be it focus group, be it clients advisory council, it is good to standardize it so that everybody across your organization will be able to use it without thinking every time, "How do we set up this process?" If it's been standardized, everybody can adopt it and use it. And to talk more about standardization, the benefits and the usefulness, I'm going to pass it back to Robert to give us examples and explain standardization more. Over to you, Robert. Okay. Alright. There's a question. Okay. I have so many Slidos and I'm happy everybody is taking part in it. So this question before we move to Robert is really to also test your knowledge about everything we have talked about.

Poll Question

AO: So we've talked about different approaches. So I want to know,

Which of the mentioned approaches do you think you might be able to use in your work?

AO: ... considering your clients, considering your resources, your office capacity, and all of that. So we have a client feedback survey leading, focus group discussions, needs assessment, advisory council. I like that. Town halls, yep, participatory design. Good. [laughter] Surveys are still leading, but I really want to give an answer to that question. I'm really happy everybody answered.

AO: And there were different opinions, but the answer to that question is really that there is no answer. There is no one-size-fits-all. There's no standard approach. It all depends on what you're looking for. So if you want to get more knowledge about a program you already have in place in depth from your clients, then a focus group will work. If you just want to survey like a temperature check of your clients to know whether they're satisfied or not, a survey will work. If you want to build a new program and you want clients to be designers, partners in the program, then an advisory group council will work. So basically, there is never a one-size-fits-all, and what you choose in terms of strategy and tool really depends on what you're looking for and what you want to gain out of the experience. So now Robert is going to tell us more about standardization.

Standardizing the Collection of Client Feedback

RR: Thank you very much, Celia. And yes, standardization is really key. And I'd like to harken back to the beginning of the presentation where you kindly provided your response and your experience in providing feedback when you liked a service or when you didn't like a service. And from what I can remember, at least with the dislike, a lot of people just stopped using the service altogether. And I think the second one, not to say it's a competition, but like one of the second ones was “recommended that people stop using the service.” And so for some of you, the way that you provided feedback or reacted to the service, whether positive or negative, was very much using your informal and your own way of kind of providing feedback.

RR: And for some of you, you did provide feedback directly to the service or using some kind of a similar channel. And so we want to really spend some time, relatively, talking about the importance of having those channels available. And so to Celia's point, she spoke a little bit about how these different approaches can be useful in terms of addressing certain types of client feedback and engaging with clients in specific ways. I'm going to just kind of break it back, or kind of give it an overview in terms of some of the basic benefits. And one of them, and we've been talking about it, is that it sends a clear message both internally and to the clients that client voice is central and important for the work, right? If we're saying that client voice is important to being able to decide on how programs are designed and how services can improve, this is a great way of saying we're committed to this approach, right? So there's an accountability and transparency piece to that.

RR: And I'm not going to go everything... I'm not going to go over everything here, but I'm just going to highlight a few, including the next one. In standardizing the way that you collect client feedback, you make sure that collecting client feedback is easier to maintain, to transfer and scale. And what I mean by that is that a lot of work has already been put into this, and this kind of relates to the other points. It's been vetted. It's had different contributions from different experts, from different stakeholders, including client input. It's been piloted. It's gone through revision. It's gone... It has a lot of input, and so a lot of the work in terms of establishing it as a reliable tool and the steps that go into that has already been done.

RR: And so in terms of lift, in terms of benefiting from that, it's there, right? And so there's not a lot of... There's not a need for any major overhaul for an office or a project or a program that wants to take up this approach and doesn't necessarily have the resources. And in taking up this approach, right, because of these steps, you already have a process of how you're taking up client feedback and reviewing the data and getting back to the client. And so it becomes... As you use these steps, it becomes part of the structure and less dependent on staff. And what I mean by that is a staff might be transferred to a different role. They might be promoted or in some cases, there's turnover. And so because it's very much of this process, you're able... Another staff member could step in who has a similar skill set and fulfill the needs in terms of client feedback. And then lastly, scale, right? Because you have the steps and resources available, you're able to scale their client feedback approach accordingly.

RR: The last thing I wanted to highlight, and I touched on it a little bit, is this idea of "higher quality yields higher quality data and better insights, right?" So it's been vetted, it has all these different and important inputs. And so what this means is that you're able to ask the right questions and get quality responses as opposed to a variety of approaches where you might not really be asking the right questions and not getting the responses that you could actually act on.

RR: And on the next slide, I'd like to just kind of highlight just a few more benefits of standardizing client feedback, and I'll try not to spend too much time, but I think these are really important, including the first one. In having a central way—and I should have clarified this. When I [say] standardized, it doesn't mean one-size-fits-all. It means that there is a central way, a central process, a unified under approach in terms of the client feedback method that you're using, and the client feedback method you're... and how you get back that feedback. And so no matter where the client is or at what point, they have equal space to be able to provide feedback about the service that they received.

RR: And secondly, for you, as you're utilizing client feedback in this way, in this approach, you're able to look back on that feedback over time and see where the changes have led to, or where they haven't led to, and then act on those. So it's a really great source of continuous improvement. And lastly, there's strength in a shared approach. And what I mean by that is that you're able to... As different sites and programs and projects are able to utilize the same approach, you're able to reflect on the things that are working, the challenges and the progress and the different steps as you're going through. And so it's less of that siloing and more collaboration and pushing things forward.

Case Study 1: Standardizing the Client Satisfaction Survey

RR: And so I've been talking about this... in general, and now I want to... speak to an example. And some of you kind of spoke to this in the last Slido, is within the IRC, we standardize a client satisfaction survey. And for this effort... And I apologize if I'm talking very quickly, that's just my nature. For this effort, one of the things that we wanted to do was when we say "making the client voice central," it's not just doing something and then giving it to the client. We wanted to include the client as part of the process. And so clients, adult clients that were actively receiving services were part of a client working group, including staff, and they served as advisors, consultants, and partners in this process, right? And through that process, they identified six key characteristics of high-quality programming that they felt were the most important.

RR: It was respect: So, were they treated respectfully? It was communication: Were they able to reach their caseworker when they needed to? It was transparency, having to do with being able to receive information in a timely manner. It was also impact, right? So were they able... Did the service impact their life in a positive way?

And did the service give them a sense of security? And so we were able to identify these six key indicators and also just a general sense of client satisfaction with services through asking them what they liked, what they didn't like, and what they would change about the service. And as part of this—and here's another piece of the standardization—there's a number of things that were put in place to support other programs in adapting this.

Standardized Resources

RR: And so on the next slide, I wanted to just quickly highlight some of those things. Survey toolkit lays out all the steps and processes involved in the client satisfaction survey and also all the pieces that we've spoken about in terms of the client feedback loop. Training resources through Kaya and training resources for the people that are actually conducting the survey are available so that there is an understanding about how data should be protected, how information should be carried on in these different steps. And there's different tools like noted here that are there to support staff as they're working to communicate with clients, as clients are able to learn about the survey. And then the last piece I'll just kind of highlight here, the last two pieces, and this speaks to what my colleague Celia mentioned earlier, the importance of not only collecting the feedback, but reviewing and analyzing it, right? So guidance for offices and programs that are doing this work and how to kind of work through that.

RR: And the last piece I think is also very important, right? It speaks to this idea of data transparency and being able to do that review. And so internally we use a Power BI dashboard to make that data available in a non-personalized way, non-identifiable way to staff. And so they're able to look at the results of the survey and be able to analyze and review and then take that and determine what things that they can do as part of this effort. And so I'd like to kick it back to my colleague Celia, who will speak on improving services and closing the feedback loop.

3. Improving Services and Closing the Feedback Loop

AO: Thank you, Robert. Thank you. So now I was reflecting back to the responses from the first Slido question about the feedback and [how] we'll react if we're in certain situations. And I saw the responses. Some people totally said they would not go back there. And I'm trying to relate that back to our clients and whose services we're providing to them. Their lives depend on it, their livelihoods depend on it and all of that. So I'm trying to imagine if they make such decisions about us to say they're blacklisting us and they're never going to go back to our services. So it just goes to show the importance of collecting feedback and closing the loop, following the loop, not skipping one step. Following the process and actually improving our services and designing programs that would really, really be impactful to our clients.

Closing the Feedback Loop

AO: So, closing the feedback loop is the last step of the feedback process. This is very, very important, but like I mentioned earlier, often neglected. It promotes client-centered programming, trusting and accountability, but most of the time, we don't follow it through. And what does it mean? It means a feedback loop is closed when we reach out to clients to give back to them the actions we have taken based on the feedback we collected from them. As simple as it is, it's usually a problem that we usually encounter. To drive this home more on the next slide, I want to bring your attention to the dimensions of accountability and why it is very important that we put our clients in the same level of accountability that we give to other partners.

Types of Accountability

AO: So it's a multi-dimensional approach when we talk about accountability, particularly as it involves us as service providers. The first part I want to mention is upward accountability. Everything goes up to our funders. Everything we do, we write the report as they want it, we send it to them even before due dates to make sure that everything is received as a way of us being transparent and accountable. Then we have a sideways accountability, which is to other agencies and partners. Maybe we're getting funds from them or maybe we are working together, but most of the time we make sure that they're updated on everything we're doing.

AO: And then there's inward accountability with our colleagues, with our other staff members, with board members. We make sure every information they're supposed to get always gets to them on time. Then the last part of the cycle is the downward accountability, which is to the clients. Everything we're doing goes downwards to them, and this part is often neglected. We don't follow it, and it's very important we see through our accountability commitment, be it to our funders, be it to our partners, be it to our colleagues, and also to our clients is very, very important. So, I just wanted to share this with you so that you know what you have been doing in terms of accountability and where you need to work more.

Strategies to Close the Feedback Loop

AO: On the next slide, I continue to talk about the strategies to close the feedback loop. So as with every strategy and every term we've mentioned today, it's never a one-size-fits-all. So it's very, very important to be intentional about the strategies we're putting in place. We shouldn't say, "Because it works for Client A or Office A, it has to work for Office B." Clients are different, office structures are different, dynamics are different. So it's always very good to be intentional and to really study our clients and their preferred mode of communication.

AO: So that's my first item here. It's very important to ask the client themselves how… they want to be communicated to. Most of the time, we do focus group and advisory council to collect the feedback, but to give the responses and everything we have done back to clients, we might not be able to use those channels. So it's very important to learn from the clients themselves how they want us to reach back to them on what we have put in place because it [keeps] them informed about our actions and our progress and then it also helps to set expectations about time and action. So once a client feels, "Oh, I've already told this organization about this thing," they don't hear from us. So they keep on waiting and waiting and waiting. And one other downside to this is that whenever we decide to reach out to them again for feedback, they repeat the same question and ask for the same thing because nobody followed up with them.

AO: And "no" is also a feedback. So if they requested for something and it's something we can't put in place due to our policy, due to capacity or funding or whatever it is, it's also good to reach back to them because that of course closes the case with them, and also it stops them from repeating the same question and for us to start analyzing the same trend and results and responses every time. So this just makes everything work better for us as the service providers and also for the clients. So it's very important to follow the steps when we decide that we're going to put strategies in place to close the feedback loop with clients.

Tools for Closing the Feedback Loop

AO: On the next slide, at IRC, just like my colleague Robert mentioned earlier, we make sure we partner with clients to know what works best for them. And some of the things we have put in place is to actually ask them, "How do you want us to reach back to you about what we have put in place? How do you want to hear from us?” And clients themselves identify strategies and ways and tools. Of course, there's a phone call, which most people voted for because if you call me, I'll pick [up] and I'll hear from you directly. There's text messages where some people say, "I'll be working. I might not be able to pick [up] your calls." Some people are saying, "Everything you have done, can you just put it in the video so I can just watch and then I understand it?" And then some people are saying, let's have group chats where you can just put whatever information you want to tell us. Example is WhatsApp groups chat or even social media, Facebook or Instagram, anything at all that we can always press and see what you have for us.

AO: So it's very important to identify these strategies or tools or ways, and then channel the right one towards the clients that have requested for it. So in closing the feedback loop, it's also two-sided or two-directional. So there's the first part of just giving an umbrella feedback, like, “Thank you for your feedback.” Like a bot text message or a call, or a video or a letter or a mail, anything at all thanking the clients for their time, for their participation and saying that, "We've looked through your responses. We've seen this, identified this, that, that, these are the things that we're taking immediate action on." It's very important because then it gives them this sense of belonging like these people actually respect us. They really, really feel for us, and they are willing to tell us everything they're doing with our responses. As minute as this might sound, it goes a long way in how they assess and how they see our services as service providers.

AO: And word of mouth is also very important. Once one bad deal is done, it goes and flies around and everybody hears about it. So it's very good for us to just look for ways to mitigate all of this in the first place. So with that, I would like to share some case studies of all the strategies, everything we have been talking about. All talk and no action is no action. So it's good to actually put them in perspective to make you understand better how all of these initiatives that we have been talking about, how they've actually panned out to a very, very productive, effective, and impactful service delivery to clients.

Case Study 2: Using a Client Feedback Survey

AO: And I'd like to cite two examples from IRC offices. The first one is from an office that decided to use a feedback survey to hear back from the clients, to get how the clients feel about the services that they're providing. So each of the case stories I'm going to share, they went through all the steps of the feedback process. They collected the data, analyzed it, took action, and followed up with the clients.

AO: So with the feedback collection survey, the office decided to survey 55 clients across 10 programs, mindful of nationality, language, literacy, and everything they need to put into consideration, their informed consent, safeguarding. They put everything in place and administered the survey. So from the survey, they analyzed the responses and they came up with the things that stood out. One of the things that actually blew the office's mind was the fact that [quality of services was rated] 3.8 out of 5.... So they were like, "Okay, we thought we were at five [out of] five." And then the more shocking one was that 58% of their clients expressed difficulty accessing services. So the services are there but clients don't even know how to access them. Clients don't even know the services were being provided.

AO: So with that, they got the responses, analyzed it and decided, "Okay, what are the actions we can put in place?" And by also talking to the clients, they got an in-depth knowledge of what needed to be put in place. And one of the things they did which actually resulted into almost 100% satisfaction was that they decided, okay, if clients don't know how to access services, what is stopping them? Clients don't have their case worker’s phone number. They don't know who to call for what. They don't know anything. So they decided, okay, why don't we make a directory where we put the phone number of case workers, all the other programs we have, who to call when you need this, that, that, where to go when you need this, that, that. They made it in [the] form of a directory that clients themselves could hold and they could see and they could flip through.

AO: And with that, clients came back and started to say, "Why didn't you guys do all of this all along? Now I know who to call. Now I've received such service and when I needed it and all of that." So that was very impressive. And when they did that, they actually told the clients, "This is what we have put in place."

Case Study 3: Using a Client Advisory Council

AO: The other case study is about a client, an office now that decided to go the participatory approach way by constituting a client advisory council. So like I mentioned earlier, that's for clients from different programs, nationalities, languages, literacy levels to come together and decide how they want the programs to run. So this ran for three months for the first cohort, then later for six months.

AO: But what they did was to meet every weekend with these clients and ask them questions and allow them to speak up what they would like to see put in place. And of course there was also the suggestions. Some the office was able to implement on the spot. One of the suggestions was, "We don't even know how to lay complaints when we have complaints." So with that, the office was able to establish a referral system whereby every phone call about a complaint is inputted into a system and it goes to the appropriate quarters, and there's a timeline on when it should be resolved.

AO: And there's a follow-up procedure on how to call the client back to say, “This is what we have done.” Those were the immediate things they were able to put in place. And then there were other suggestions like dedicated phone lines, putting clients in an area where they have people from their nationality, and things like that. And this was what I mentioned earlier about some things clients will say that we might not be able to put in place. So clients are saying, "Oh, I'm from Sudan. I want to live in an area with other Sudanese." That might be impossible for us to implement, but the office followed up with the client to say, "This might be impossible now." So the clients will not have it at the back of their mind that they're going to take them to an area with people from their country.

AO: So these are two examples of where the feedback process was strategically followed through and the impact has really been helpful for the offices. And other offices in the network are suggesting to go the same route. So I thought that would be a good way to end this presentation.

Discussion Questions

AO: And then of course I have my Slidos and two more questions for you. So from everything we have said today,

What do you think are the next steps you need to take for effective client feedback strategies in your program?

AO: So this also, of course, is not a one-size-fits-all. We just want to see what you think are the barriers to you implementing effective feedback collection strategies in your programs.

AO: Streamlining client feedback data system and database, follow-up plan, discuss option with programs manager and staff, mission to contact clients. That's a new one. Buy-in from the team and leadership, funding, yes, better communication with clients, create a process. That's very important. Buy-in. I see a lot of buy-in. Communicate our feedback is being implemented, addressing language barrier, very important. Time, creating clear survey and communication to receive feedback. “Create a process” keeps coming up. I like that because that's like the most fundamental thing. You have to have a process in place.

AO: So my last question for the day is,

If there's one thing you're taking away from this session, what would it be?

AO: Communication is key.

RR: Very true.

AO: Communication, value of feedback. Yeah. Realize how greatly client feedback is also lacking. Close the loop. Yeah, close the loop. [laughter] Closing the loop. Yes. Participatory approach. Yes. Standardization. Robert, standardization is very important. So people are going away with it. Yes, I really like that and it shows how attentive you have been and how you have seen the importance of all these strategies we have talked about. Of course, it's time to take your questions if there's any.

Q&A Panel

SB: Thank you, Celia and Robert. And I also want to say thank you to everyone who's already been putting their questions in the chat. I think we have a couple of minutes just to answer some questions before we do resources and... the survey. So let's start with this question that we got about funding.

So where do you get funding for collecting and incorporating client feedback? Can you advise on opportunities?

AO: Yeah, thank you. Funding is a multiple-headed monster that always comes up and most of the time is the most cited barrier. So I like that that question is coming up. So ideally, best practice is feedback should not be... Feedback collection should not be a standalone process. It should be incorporated into everything we're doing. So as you're designing your program life cycle right from the beginning of the project life cycle, there should be element of feedback in there so that you don't get to a point where you've done everything and you're like, “Wait a minute, how do we collect feedback?” So it's very important to incorporate it right from the beginning. So no matter how little funding you have... you should put an element of feedback collection. And that's why we talked about low resources and high resources. There should be something you should be able to put into the planning.

AO: And also we... Examples from our offices in the IRC, they leverage on funding resources from hospitals, from universities. They're just there. There's a whole lot of resources. I may not have most of them at the tip of my fingers now, but there's a whole lot of universities that are looking to sponsor programs like this. So sometimes in the office, the grant department, they have somebody that is dedicated to looking at all these opportunities and just tapping into them. So if you do get those, it's going to be like a win-win thing because you have already incorporated it into your plan anyways, but in case you don't get any, having that provision for it would be helpful right from the beginning of your program or project life cycle.

SB: Thank you, Celia. Another question that we got is,

If we choose a survey as the client feedback mechanism, do you recommend enabling anonymous responses? Do you think this has any effect on survey participation rates, or would you advise against it because of the closing the feedback loop piece?

RR: I can try to speak to that one, and I think it touches on some other questions that were raised in terms of following up with clients as well. I think, yeah, there's two prompts to that. So basically, yes, I think it's valuable to have the confidentiality and anonymity piece, and I think one of the pieces that helps with supporting clients really sharing their feedback and feeling comfortable and providing it as a survey or whatever other mechanism is that whoever they're providing the feedback to is likely not providing their service directly. So where you have the opportunity and the resources, and like Celia said, these things that should be built in, having something like what we call an enumerator—which is an interpreter who has the language skills and has some experience in data collection—step in and be the person, the people that reach out to the client in their preferred language and are able to collect that data.

RR: So that helps in one piece, and that data can be anonymous. And I think where it helps, in terms of the follow-up, well, the survey is one piece, but I think there's definitely a value, and we're doing this internally as well, and following up with clients is part of a focus group. So adding in questions like, "Would you like to participate in a focus group?" that can help bring it back to the clients. And also, like we mentioned before, one of the things that was helpful in terms of client satisfaction process and that we continue to ask is how do clients prefer to hear back about the changes that are made, the results and the changes? So asking clients directly about these questions and also leveraging the different channels that you currently use, right? So you have community forums, you have, excuse me, WhatsApp chat groups and things like that. And that way you can either connect directly with the client or more generally just reach out to clients as a whole in terms of the work and the changes that you do. Yeah.

SB: Thank you, Robert. I think we might have time for maybe one more quick question. There's a question which actually is about a big topic, survey fatigue.

How do you plan for survey fatigue?

RR: Celia, do you want me [to] or do you want to? [laughter]

AO: I think we can both speak to that. And that's why I'd mentioned earlier about planning the questions and what you need the data for right from the beginning, because what leads to survey fatigue is going back to clients over and over again, sometimes even with the same question. So it's good to streamline the questions you want to ask as it speaks to what you want to do and what you're planning to do.

AO: And also following back with clients—this keeps coming back because once you follow up with them and they know they have received an answer or a response to this particular question, it just gives them this feel that the new questions you're bringing now are new and it doesn't have to be a repetition of what you've asked before. Or when you continuously go to them quarter after quarter, year after year with the same question, then they're just going to be so tired. So it all depends on how you set the tone and what they know you usually do. So with that, Robert has implemented some of the surveys, and I'm sure they put into consideration the survey fatigue and were able to overcome that, Robert, do you want to speak to that?

RR: Yeah, sure. In the case of the client satisfaction survey, it's currently being piloted within a program, and it's specifically working to reach clients that have exited and it hasn't been done before. So at the very least, it's questions that are specific about the service and their experience and it hasn't already been asked in particular having to do with that service. So at the very least, there's not that extension. And also, like I mentioned before, it was something that was developed with the clients, and so really focusing in on the specific questions and not overdoing it in terms of a bunch of questions that you might not use and might not serve to get the client feedback, I think is also helpful. Thank you.

Conclusion

Reviewing Learning Objectives

SB: Thank you. And so let's just do a quick review of the learning objectives for today's session. So, by the end of the session, hopefully you're now able to describe why collecting and using client feedback data is essential for effective services, compare feedback data collection approaches, including two-way communication strategies, and identify ways to use client feedback to improve services and close the loop.

Feedback Survey and Recommended Resources

SB: And so we'd really appreciate it if you could please just take a couple of minutes to do this feedback survey very relevant to the topic that we're covering today. So the survey is extremely important to help us improve future trainings. It's just three questions long and takes around 30 seconds to complete. So we're just going to wait in silence for 30 seconds before we share resources.

SB: Alright, that was less than 30 seconds, but I know we're running out of time. The link for the survey is also in the chat, and then also the resources were just shared in the chat. These recommended resources are going to be shared as hyperlinks when these slides are uploaded on the Switchboard website and also shared with you all in email.

Stay Connected

SB: So thank you all so much for joining us today. For more training and technical assistance, stay connected with Switchboard through any of these means: email us at switchboard@rescue.org, visit us on our website, or follow us on social media. On behalf of all of us at Switchboard, thank you for learning with us, and we hope to see you again soon.

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