

How to modernize your XM program with digital invitation methods

As feedback methods evolve alongside customer interactions, it's no longer enough to rely on receipt-based invitations. Consumers are continuing to turn to digital channels, and brands must adopt innovative engagement methods to collect feedback across the customer journey.

Based on cross-client analysis, this summary highlights the benefits of email invitations, why it's important to collect feedback from a variety of channels, and the impact digital methodologies have on your XM program.

The most widely used digital collection method, email invitations provide a variety of benefits, including:

- **Higher volume feedback:** On average, clients using email invitations see a 20% increase in valid responses.
- **More representative sample:** With 10% more feedback from less frequent customers than POS receipts, email invitations expand the reach of your XM program.
- **More holistic insights:** By collecting more valid feedback from a broader set of your customer base, it's easier to make strategic improvements that impact the entire organization.




While the impact varies across industries, it's important to note that the increase in sample size and representativeness will likely lead to a drop in Overall Satisfaction (OSAT) scores. Be sure to communicate early + often that the shift is expected and will ultimately help inform more comprehensive improvement strategies.

Difference in OSAT: Email + POS invites vs. POS only

-17ppts	-5ppts	-10ppts	-10ppts
RESTAURANT	RETAIL	C-STORE/GROCERY	OTHER

Beyond email invites, there are a number of digital invitation methods that could broaden the scope of your XM feedback.

To illustrate the impact, we've included a few client examples:

Invitation method	% of responses	OSAT difference
 QR CODE	26%	NO CHANGE
 SMS TEXT	30%	-9ppts
 IN-APP	55%	NO CHANGE

There's a lot that goes into a successful experience management program—and SMG is here to provide guidance each step of the way. We partner with clients to develop a comprehensive approach that enables them to hear from all customers, so they can inspire loyalty across all touchpoints.

To learn more about feedback management best practices, reach out to your SMG team or visit smg.com/contact-us.



About Service Management Group

SMG inspires experiences that improve people's lives. We are a catalyst for change, providing actionable customer, patient, and employee insights that boost loyalty and drive business outcomes. Our unique model puts a dual focus on platform technology and professional services—making it easier to collect, analyze, and share feedback and behavioral data across the enterprise. To learn more about our customer experience management, employee experience, and brand research solutions, visit www.smg.com.