

SURVEY MECHANISM WORKSHEET

This worksheet helps you capture the elements you need for your customer voice surveys. It repeats all the key topics which are covered in PART 2 of the Customerfit sprint pack 'Listening to and acting on the customer voice'.

By watching the videos in the sprint pack, and then answering the questions on this worksheet, you will have covered the most important topics you need to consider when launching your first survey. Do remember that the only right answers are the ones that work for you and your customers. And if you really don't know the answer, just try something. Then learn and improve.

1. Who do you want to survey?

The first decision you need to make is WHO you want to survey. As seen in the corresponding video, you ideally answer three questions. These can lead you to a primary survey audience, as well as some potential runners-up.

What is your highest value customer segment?

Which segment has the simplest decision making structure?

Which business unit wants to take the lead?

This is placeholder text you can replace with your own.

This is placeholder text you can replace with your own.

This is placeholder text you can replace with your own.

Primary survey audience

This is placeholder text you can replace with your own.

Additional (next step) audience

This is placeholder text you can replace with your own.

Additional (next step) audience

This is placeholder text you can replace with your own.

2. When do you want to survey?

The timing and frequency of your surveys depends on the type of feedback you seek. Once you have made your choice, this section helps to focus on some of the key questions you need to answer. It relies on the concepts discussed in the corresponding video.

You want to collect relationship feedback.

In the case of relationship feedback, you probably want to start by surveying once a year (you can always increase the frequency later ☺).

So there is only one timing decision to make. Considering the work involved to set up your customer voice programme, when do you think would be a good target date for sending your first survey?

.. / .. /

You want to collect transactional feedback.

In the case of transactional feedback, you want to focus your attention on the *high heartbeat* moments in your customer relationship. If you need to prioritise further, you can narrow them down by starting with the moments that affect the *highest volume* of customers.

So use the space below to write down the high heartbeat moments for the primary survey audience you selected above. If needed, indicate a ranking for the volume it represents. Remember to also use the downloadable template to think through the customer relationship stages and high heartbeat moments for your business.

Which are the TOP 3 highest heartbeat moments for you customer?

Rank by volume

This is placeholder text you can replace with your own.

Indicate #1, 2 or 3

This is placeholder text you can replace with your own.

Indicate #1, 2 or 3

This is placeholder text you can replace with your own.

Indicate #1, 2 or 3

It is recommended to start by measuring ONE transaction only. As you get more familiar with the customer voice, you can expand your focus. So, looking at the TOP 3 heartbeat moments:

Which is the first transaction where you would like to evaluate your customers' experience?

This is placeholder text you can replace with your own.

When is the best time to evaluate this transaction (e.g. 24 hours after service is rendered, when sending the invoice, ...)?

This is placeholder text you can replace with your own.

3. How will you phrase your core questions?

When you've chosen your survey audience and the timing/type of survey you want to send, you can formulate your core questions. As discussed in the corresponding video, it makes sense to tailor these questions to your situation and the customer's state of mind.

Using guidance from the video, how do you want to phrase the general recommendation question that evaluates the experience?

This is placeholder text you can replace with your own.

Which phrasing will you use to show empathy for the customer situation in the follow-on questions 'Why?' and 'What to improve?'

WHY?

THE ONE THING TO IMPROVE?

For a happy customer/promoter (scoring 9 or 10)

This is placeholder text you can replace with your own.

This is placeholder text you can replace with your own.

For a satisfied customer/passive (scoring 7 or 8)

This is placeholder text you can replace with your own.

This is placeholder text you can replace with your own.

For a dissatisfied customer/passive (scoring 6 or less)

This is placeholder text you can replace with your own.

This is placeholder text you can replace with your own.

4. Which additional questions will you ask?

In addition to your core questions, you can ask additional ones. You can write all of them in the coloured spaces below. Remember that the video regarding the additional questions is accompanied by a downloadable template. This helps you evaluate the questions you consider.

Which extra questions would you like to ask in your customer voice survey? Remember, as indicated by the colours, 10 is a HARD maximum.

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5. How will you capture feedback?

There are multiple methods to collect customer feedback. Use the section below to indicate the ones that you will use for your customer voice programme.

Having evaluated the plusses and minuses of each option, how will you reach out to your customers?

digital: Please indicate the type (email, chatbot, ...)

telephone letter face-to-face

other: Please briefly describe the method.

6. How will you measure your survey performance?

In the corresponding video you reviewed a number of ways to evaluate the performance of your surveys. Below you can write down the measures you want to implement.

Which measures do you want to use to evaluate the performance of your surveys?

Please indicate the measurement of your choice.

Please indicate the measurement of your choice.

Please indicate the measurement of your choice.

Please indicate the measurement of your choice.

Please indicate the measurement of your choice.