PEOPLE ENGAGEMENT WORKSHEET – CUSTOMER-FACING EMPLOYEES

This worksheet contains the questions you will need to answer and the elements you need to put in place, to ensure that your people are willing, skilled and able to implement each part of your customer voice programme. On this page, we particularly focus on the needs of the people who <u>directly engage with customers</u> (e.g. in sales, customer service, …). While your particular situation may require you to consider additional questions and elements, you can start with the list below, as this is based on the actual questions asked and elements needed in other companies.

	PROMOTE WILLINGNESS	INCREASE SKILLS	ENSURE ABILITY
	Questions to answer	**Questions to answer**	**Support elements to put in place**
The customer voice programme as a whole	**Why do we need a customer voice programme?** Refer to the introduction to this sprint pack, as well as the module *'motivate your stakeholders'*.	**How does the customer voice programme fit into our overall strategy?** Clearly link the customer voice programme to one of the customer elements in your strategy.	**An internal communication programme** Build internal awareness of the customer voice programme by sharing its importance and especially the success stories. See: *'motivate your stakeholders'* in PART 3 of this sprint pack.
Survey	**Why do we use these questions and don't we use others?** Refer to the logic you used in the *'survey mechanism worksheet'*.	**How do I read this survey? What are its components?** Create a training module explaining the way the survey is set up.	**A survey mechanism** Set up a survey mechanism, as discussed in PART 2 of this sprint pack.
Action flag	**Why are some customer comments flagged for action and others are not?** Explain people why you have prioritised certain action flags (e.g. react to 0-6 scores). Also explain that unhappy, satisfied and happy customers need different follow-up.	**Which are the types of action we can take? How do they work?** Create a training module explaining the different types of actions.	**An action flagging process** • Set up a process to automatically flag customer feedback for action. • Make sure the customer voice management system supports this. See: the relevant *'action processes'* and *'system modules'* in PART 3 of this sprint pack.
Allocate	**Why do I receive this piece of feedback? Why doesn't it go to someone else?** Show the logic behind the allocation process which you have drawn up as part of your *'action processes'*.	**What do I need to do when a piece of customer feedback is allocated to me?** Create a training module explaining the *'action processes'* you have designed.	**An action flagging process** • Set up a process to allocate customer feedback to the right action owner. • Make sure the customer voice management system supports this. See: the relevant *'action processes'* and *'system modules'* in PART 3 of this sprint pack.
Act	**Why is it important that this action is taken with care?** Keep repeating the same arguments that you have used to explain the need for a customer voice programme as a whole. Also explain that, unless an action is done well, it is a waste of company resources.	**What are the actions I need to take? What if the customer goes *off-script*?** Create a training module for the processes you have designed. Ideally this is trained through role-play, where special attention goes to: • unexpected situations • situations that require help from other departments. Follow up with continuous coaching (also see *'huddles'* in the *'learning methods'* section of this sprint pack)	**Set up action guidance processes** • Give guidance to help action owners deal with negative, neutral and positive feedback. • Make sure the customer voice management system supports this guidance. • Provide continuous encouragement and coaching to *do the right thing*. • Set up a simple process to involve other departments in individual customer feedback actions. See: the relevant *'action processes'* and *'system modules'* in PART 3 of this sprint pack.
Escalate	**Why do I need to escalate? Why can't I/do I need to solve this myself?** Explain the escalation process you have designed. Remember: don't overdo the processes!	**When/how do I escalate or not? How do I escalate to the customer?** Ensure that your training modules for acting also include a component for escalation & transfer management.	**An escalation process** • Set up a process to escalate or transfer customer feedback. • Make sure the customer voice management system supports this process See: the relevant *'action processes'* and *'system modules'* in PART 3 of this sprint pack.
Log learning	**Why is it important to log the learning?** Explain how any learnings that are logged will benefit a colleague, but also how - if another colleague logs their learnings - this can benefit the person asking about the importance of logging.	**How do I log my learnings?** Create a training module that shows people: • how to use the system for logging learnings, • how to write down their learnings in a way that is clear and usable.	**A learning log** • Set up a process to log any learnings. • Make sure that the customer voice management system supports this process. See: the relevant *'action processes'* and *'system modules'* in PART 3 of this sprint pack.
Measure	**Why do we need these measures? Do they actually help me or are they just in my way? Are they a threat?** What ever you say, is less relevant than how you behave. If you use the measures for learning and coaching, all will be fine. If not, people will find ways to subvert them.	**How to interpret these numbers? How can I use them to my advantage? How do I avoid them being used against me?** • Create a training module to explain the different metrics and the methods for improving performance. • Do not use metrics against people.	**A set of performance measures** Select a limited and simple to understand set of survey and action performance measures, which become part of daily operational reality. See: the relevant *'measurement modules'* in PART 2, 3 and 5 of this sprint pack.

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PEOPLE ENGAGEMENT WORKSHEET – NON-CUSTOMER-FACING EMPLOYEES

This worksheet contains the questions you will need to answer and the elements you need to put in place, to ensure that your people are willing, skilled and able to implement each part of your customer voice programme.

On this page, we particularly focus on the needs of the people who do NOT directly engage with customers (e.g. in support functions, logistics, production, …). These individuals are not expected to directly respond or deal with customer feedback, but they may be called upon to provide support on individual or structural topics (see also PART 5 of this sprint pack).

While your particular situation may require you to consider additional questions and elements, you can start with the list below, as this is based on the actual questions asked and elements needed in other companies.

	PROMOTE WILLINGNESS	INCREASE SKILLS	ENSURE ABILITY
	Questions to answer	Questions to answer	Support elements to put in place
The customer voice programme as a whole	**Why do we need a customer voice programme?** Refer to the introduction to this sprint pack as well as the module '*motivate your stakeholders*'.	**How does the customer voice programme work?** As this audience will not need to work with the programme on a daily basis, a less detailed introduction is sufficient. Create a summary overview of: • how the customer voice programme links to the customer elements in your strategy, • how the survey mechanism works (which questions, how they are asked, …), • how the action mechanism works (which types of action, how it is taken, …).	**An internal communication programme** Build internal awareness of the customer voice programme by sharing its importance and especially the success stories. See: '*motivate your stakeholders*' in PART 3 of this sprint pack.
Supporting individual action	**Why do I need to be involved in this programme? I don't talk to customers.** Use practical examples from your company to demonstrate that customer-facing colleagues need the full organisation's support to meet their individual action goals. If the non-customer facing teams provide this support, the organisation and their colleagues are successful. If the non-customer facing team leans back or focuses on their "silo", the organisation and their colleagues will fail.	**How do I help a colleague act on individual feedback? What do I practically do?** • Create a training module explaining the process to get involved in customer feedback (ideally using real cases and role-play). • Create a training module where internal departments are shown how to act and behave when customer feedback takes the organisation *off-script*. See: the relevant '*action processes*' in PART 3 of this sprint pack.	**Set up action guidance processes** • Give guidance on how you want non-customer facing employees to help customer-facing employees deal with negative, neutral and positive feedback. • Make sure the customer voice management system supports this guidance. • Provide continuous encouragement and coaching to *get involved* and *follow the customer lead* (rather than mindlessly enforce internal processes). • Set up a simple process for non-customer facing departments to get involved in individual customer feedback actions (+ make sure they have the time to do so). See: the relevant '*action processes*' in PART 3 of this sprint pack.
Log learning	**Why is it important to log the learning?** Explain how any learnings that are logged by non-customer facing staff will accelerate adequate support the next time a similar piece of customer feedback is provided.	**How do I log my learnings?** Create a training module that shows people: • how to use the system for logging learnings, • how to write down their learnings in a way that is clear and usable.	**A learning log** • Set up a process to log any learnings. • Make sure that the customer voice management system supports this process. See: the relevant '*action processes*' and '*system modules*' in PART 3 of this sprint pack.
Measure	**Why do we need these measures? Do they actually help me or are they just in my way? Are they a threat?** What ever you say, is less relevant than how you behave. If you use the measures for learning and coaching, all will be fine. If not, people will find ways to subvert them.	**How to interpret these numbers? How can I use them to my advantage? How do I avoid them being used against me?** • Create a training module to explain the different internal action metrics and the methods for improving performance. • Do not use metrics against people.	**A set of performance measures** Select a limited and simple to understand set of internal action/support measures, which become part of daily operational reality. See: the relevant '*measurement modules*' in PART 2, 3 and 5 of this sprint pack.

PEOPLE ENGAGEMENT WORKSHEET – CUSTOMER-FACING LEADERSHIP

This worksheet contains the questions you will need to answer and the elements you need to put in place, to ensure that your people are willing, skilled and able to implement each part of your customer voice programme.

On this page, we focus on the underlined additional needs of leaders at all levels in the organisation. Note that this page exclusively focuses on their leadership development needs. Their operational development needs are already covered in one of the other people engagement worksheets (*customer-facing* or *non-customer-facing* employees).

While your particular situation may require you to consider additional questions and elements, you can start with the list below, as this is based on the actual questions asked and elements needed in other companies.

	PROMOTE WILLINGNESS	INCREASE SKILLS	ENSURE ABILITY
	Questions to answer	**Questions to answer**	**Support elements to put in place**
The customer voice programme as a whole	**Why do I as a leader need to actively get involved in the customer voice?** Refer to the introduction to this sprint pack as well as the module '*motivate your stakeholders*'. Highlight the role of leadership behaviour as a key component in driving change in an organisation.	**How do I help build support for the customer voice programme as a whole?** Introduce a leadership development module, which highlights the leadership actions and behaviours that can encourage employees to participate in the programme. See also the '*leadership behaviour*' inspiration pack in '*motivate your stakeholders*'.	**An internal leadership encouragement programme** • Regularly discuss customer voice related leadership behaviour as part of the management meetings. • Create methods for leaders to get publicly involved in customer voice programmes (e.g. work in a contact centre, visit a customer, take direct customer action, …). See: '*motivate your stakeholders*' in PART 3 of this sprint pack.
Act & log learning	**Why should I – as a leader – allocate resources to the customer voice programme?** Use practical examples from your company to demonstrate that customer-facing leaders play an important role in making the customer voice benefits happen. For non-customer facing leaders, demonstrate that their behaviour and attention will *make or break* the support provided by the non-customer facing employees, to those who are acting on individual customer feedback.	**How do I encourage and coach my people to act on individual customer feedback?** • Create a development module how to coach employees on the action processes, with special attention for *escalation processes* and *going off-script*. • Create a development module to help non-customer-facing leaders free up the time and resources, to prioritise supporting customer-facing staff on feedback topics. • Create a development module to help leaders emphasise the importance of logging learnings, as well as motivational techniques to encourage people to do so.	**Set up action guidance processes** • Modify the leadership evaluation approach to reflect the focus that needs to be given to (supporting) customer feedback related actions. • Provide continuous encouragement to leaders to get involved (don't talk, but do).
Measure	**Why do we need these measures? Do they actually help me or are they just in my way? Are they a threat?** Just like for other employees, to leaders, words are less relevant than behaviours. If the measures are used for learning and coaching, all will be fine. If not, leaders will find ways to subvert them.	**How do I make sure I use these measures for good? How can I make them a coaching mechanism for my team?** • Create a training module to help leaders use the metrics in a motivating and coaching manner. • Do not use metrics against people.	**Develop the right performance culture** • Consciously ensure that leadership meetings frame any measures in a context of *action and continuous improvement*, not of assessment or criticism.

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