

Understand Customers Better with the

# Customer Listening Assessment Guidebook

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With Jeannie Walters, CCXP &



# Why Run a Customer Listening Assessment?

Initiatives to understand customers are often a matter of *good intentions, but bad execution.*

According to a [McKinsey study](#),

**93%** of CX leaders reported using a survey-based metric as their primary means of measuring CX performance

But only

**6%** had confidence that their measurements helped them make better strategic & tactical decisions.

**That's a HUGE difference!**

The good news is we can do better – and that's by gathering customer feedback as part of the overall customer journey.

**Customer Listening Programs** typically use **Customer Listening Posts** – specific tools, locations and mechanisms to gather customer feedback along specific touchpoints on the customer journey.

# Listening Posts can have a Negative Impact!

Listening posts can be incredibly important to the Voice of the Customer program and can provide the right information at the right moment for the organization.

**But listening posts can be a *negative* experience for the customer if they...**

- Are posted randomly throughout the journey by different leaders with different goals
- Request feedback that is never acted upon
- Don't provide the customer with any resolution or response

**A Listening Post Assessment can solve this by helping you...**

- Discover where and how the customer is asked for feedback
- Review where customers provide feedback proactively
- Centralize how customer feedback is collected, evaluated and shared

**Let's Get Started!**

# How to Use This Guidebook

This guidebook is only as good as the information you include in it and the team members who are using it. To make the most of this guidebook, here are some helpful tips:

- ✈️ **Involve your teams.** Lean on the knowledge of others in your organization by including them in these exercises and sharing the results.
- ✈️ **Involve your customers.** Got customers who have completed a survey or provided feedback another way? Ask them about their feedback experience. Was it what they hoped it would be? Do they feel satisfied?
- ✈️ **Use the tools you already have.** Everything is connected. Have you developed customer journey maps? Set your CX Mission and Success statements? Have you set up a CX Team with recorded roles and responsibilities? Refer to all of these as you complete this guidebook.

**Working with Jeannie and the Experience Investigators Team?** She'll guide your team through a strategic session to assess your customer listening program and work with you to turn your insights into actionable next steps.

**If you'd like to hire Experience Investigators to facilitate a strategic session, simply email [Inquire@ExperienceInvestigators.com](mailto:Inquire@ExperienceInvestigators.com).**

# The Three Exercises

In this guidebook, we'll work through three exercises:

**1 Find out where customer feedback is collected**

**2 Identify where customers are already sharing**

**3 Review how and where data is collected, used, & shared in the organization**

# 1

## Where is Customer Feedback Collected?

Ask team leaders throughout the organization to complete a simple survey about how they're collecting customer feedback. Ask employees:

1. Are you currently collecting customer feedback? \_\_\_\_\_

2. Are there specific moments in the customer's journey when you're asking for feedback? If so, list them here.

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3. What parts of the feedback process are automated? What parts are done manually?

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4. What tools are you using to track and record feedback?

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5. How are you "closing the loop" by following up with customers who have provided feedback?

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# 1

## Where is Customer Feedback Collected?

Once you've received responses to your employee survey, sit down with your leadership team and ask:

1. Are there clear, organizational rules around how, when and what feedback to request from customers? How so or how not?

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2. Is there governance around how to best approach surveys and the methods in which they're presented to customers? How so or how not?

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3. Does the customer journey include the right listening posts in the right moments along the journey? Are there too many or too few?

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# 2 Where are Customers Already Sharing?

Customers don't only share feedback when prompted. Connect with the folks in your organization who interact directly with customers and those that monitor feedback channels and ask them:

**1. On what channels have we observed feedback?**

Often, these include forums, review sites, social media, and partner websites.

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**2. How is unsolicited feedback being recorded, shared, and acted upon?**

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**3. For employees who interact directly with customers: What are you hearing from customers? Do you feel empowered to record, share, and act upon that feedback?**

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# 2

## Where are Customers Already Sharing?

Use the answers to the questions on the last page to identify:

1. Who is monitoring the identified locations where customers offer opinions and recommendations?

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2. What does your organization expect when it comes to collecting this feedback? What do your customers expect in terms of acknowledgement & action?

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3. Are there ways for customer-facing employees to submit customer feedback in real-time? Are there ways for them to act on this feedback?

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# 3

## How is Feedback Data Collected, Used, & Shared?

Once you know *where* customers are sharing feedback, now it's time to consider *how* that feedback is used. Ask:

1. Do teams have the right tools and technology to collect, evaluate and direct action around customer feedback? If not, what's missing? Why?

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2. How is our feedback data organized? Is it centralized or housed in separate databases and workflows? How can it become more centralized?

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3. Who is responsible for each action required? Is what's expected of them clearly defined and communicated?

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# Additional Resources

This may all seem overwhelming – that’s okay, and perfectly normal!

## A listening post assessment is just a tool designed to help your CX Team:

- ✈ Discover where and how the customer is asked for feedback
- ✈ Review where customers provide feedback proactively
- ✈ Centralize how customer feedback is collected, evaluated and shared
- ✈ Thoughtfully design where and how to request customer feedback based on their overall journey
- ✈ Ensure feedback requested is tied to actions and outcomes
- ✈ Close the loop with customers in a consistent way
- ✈ Include customer feedback from sources where customers share on their own
- ✈ Empower employees to make better decisions

## Take things one step at a time and lean on these resources to guide you:

### Articles:

- ✈ [How Customer Listening Assessments Create Better CX](#)
- ✈ [Improving your Voice of the Customer listening posts? Ask these questions](#)

### Videos:

- ✈ [How Customer Listening Assessments Create Better CX](#)
- ✈ [How to Improve Your Voice of the Customer Listening Posts](#)

### Downloadable Resources:

- ✈ [CX Mission Statement Workbook](#)
- ✈ [CX Leaders’ Reflection & Planning Questionnaire](#)
- ✈ [SMIRC Goals Checklist](#)

# Additional Resources

**If you'd like help preparing your CX program for success...**

Experience Investigators can help. From small businesses to Fortune 500s, we've worked with countless organizations to fulfill our goal to Create Fewer Ruined Days for Customers.™



Learn more at  
[ExperienceInvestigators.com](https://www.ExperienceInvestigators.com)

Or reach out to our team and we'll  
find the right next step for you.



[Send Us A Message!](#)

**Congratulations –  
You’re on your way to making a big  
difference for your organization and  
your customers.**

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## **How else can Experience Investigators help?**

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Or find more at  
[ExperienceInvestigators.com](https://ExperienceInvestigators.com).



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