A Guide to Setting Up a Customer Satisfaction Practice at Your Org

This guide is associated with my article on customer satisfaction practices at your organization. Please read that article for more information on measuring customer satisfaction! This guide will dive deeper into helping you set up and structure your customer satisfaction practice!

As mentioned in my article, there are quite a few steps to set up a perceived satisfaction practice. Let's dive deep into each one with concrete examples, so you can begin to structure your practice!

For the purpose of this guide, I will be using a fictional company called TeamTicket. This company helps people find the best way to travel depending on their location, budget, and timing.

Understand the general experience of users

The first step is to understand and map out your users' journey through your product. I usually bring together the team to do a journey mapping exercise to achieve this. Within this workshop, we would identify:

1. The stages people go through when achieving the goal they use our product for
2. The different touchpoints people have with our product during their experience
3. The tasks they do on our product
4. The emotions people feel during their journey (if we have them)

When we can fully understand the journey, especially where users are interacting with our product, we can begin to think of where we could insert perceived satisfaction metrics and where it might be better to look at performance satisfaction metrics.

At TeamTicket, we identify the following stages for our journey:

- Initial and subsequent search
- Choosing tickets
- Purchasing
- Pre-trip
- In-trip
- Post-trip

Within these stages, people have the following touchpoints and tasks with our product:

- Initial and subsequent search
    - Touchpoint: Search pages
    - Tasks: Searching for tickets, filtering down needs
- Choosing tickets
    - Touchpoint: Trip details page
    - Tasks: Comparing tickets, comparing trip options, double-checking trip details
- Purchasing
    - Touchpoint: Check-out flow
    - Tasks: Filling out billing information, filling out payment details, purchasing tickets, making an account (optional)
- Pre-trip
    - Touchpoint: Trip confirmation email and page
    - Tasks: Checking confirmation of payment/tickets
- In-trip
    - Touchpoint: Tickets
    - Tasks: Checking tickets, bringing up tickets to travel, getting ticket information, looking for updates
- Post-trip
    - Touchpoint: N/A

Identify levels of support during the journey

The next step is looking at how you do (or don't) support your users during this journey. This is important because it triggers when you could send or present perceived satisfaction metrics. People typically remember the low points of an experience (as well as the end of an experience), so it is critical to reach out at the right moments.

You can determine how you support (or don't) users at a given stage in a few ways:

1. Previous qualitative feedback
2. Customer support tickets
3. Reviews that point out areas of issue
4. Survey data about the experience
5. Product analytics that might indicate a problem

At TeamTicket, we look back at the stages and quantify the level of support on a five-scale basis for each stage, one = not at all supporting users, five = really supporting users:

- Initial and subsequent search
  - Three out of five because we display a large number of choices for our users, which gives them flexibility but might also be overwhelming
- Choosing tickets
  - Two out of five as we don't allow easy side-to-side comparison of prices or trip options. We also don't display other websites' prices for comparison
- Purchasing
  - Four out of five as we have a very simplistic check-out form that requires little data from the user
- Pre-trip
  - One out of five as we don't always have the ticket in our app depending on the carrier
- In-trip
  - One out of five as we don't provide clear updates to the trip and we have no way of helping users if something goes wrong
- Post-trip
  - Zero out of five as we are not a touchpoint during this stage

Decide on the metrics

Once you have this understanding of the journey and touchpoints, as well as the most negative experiences during your product, it's time to decide on metrics. This doesn't mean you have to just choose one metric and stick with it forever! When I was deciding between the SUS and the UMUX-Lite, I did some split testing to understand which performed better (in terms of response rate over time).

In terms of the information we have for TeamTicket, the worst experiences we tend to have are:

1. In-trip
2. Pre-trip
3. Choosing tickets

Now there are a few considerations to keep in mind when choosing the metric. Since people don't log on to the TeamTicket app much during the In-trip phase, we wouldn't get a great response rate there. So the two main times we could surface a satisfaction moment would be during pre-trip and choosing tickets.

When it coms to choosing tickets, we don't want to interrupt the experience of the user and take them out of a potential purchase, so it seems as though pre-trip might be the best place to surface a short survey. In that case, I would choose the UMUX-Lite. I would also potentially use a disconfirmation survey as well separate from the UMUX-Lite to understand more about failed/met expectations.

Choose how you will reach out to users (and how often)

Once we understand the metrics, we can think about how. There are many ways to reach out to users such as:

- In-app/platform
- Email
- Dedicated study
- Within a community form
- Participant panel
- Through colleagues (ex: customer support, account management)

Depending on your response rates, you might have to use several channels to get a good amount of participants.

So, when it comes to TeamTicket, we will reach out in the following ways:

- An in-app UMUX-Lite post-purchase
- A disconfirmation survey within the ticket confirmation email

In addition to that, we need to choose how often to reach out to customers. There are several options:

- Continuous measurement, where you continuously gather satisfaction metrics
- Periodic intervals, such as every quarter or six months
- Project-based intervals, such as after specific usability tests

For the UMUX-Lite and the disconfirmation survey, we will do continuous measurements, so those surveys will always appear so we can continuously gather data.

In terms of a periodic interval, I find it can be really great to baseline against any changes we have made during a given time period. With TeamTicket, I would recommend a quarterly or bi-annual email of the SUS.

Bring together qualitative and quantitative data

When it comes to measuring satisfaction, data can only tell you what is happening and give you general information about how people are feeling. It is not necessarily diagnostic. That is why it is important to bring in qualitative data to help identify and understand the full scope of the problems users might be facing.

The way I think of qualitative data in this sense is in two ways:

1. Using previous data to supplement the quantitative data
2. Creating a customer satisfaction periodic qualitative project

When using previous qualitative data to supplement the satisfaction metrics, you are pulling any previous insights that help support or better explain low satisfaction scores.

The second option is to periodically dive into the experience people are having, such as through a walk-the-store interview, to understand why a given experience may not be satisfactory. This second option is my preferred method and can be a great partner to the periodic interval satisfaction testing.

At TeamTicket, we decide to pull any qualitative data that comes up that might be relevant to the satisfaction scores (ex: people struggling to filter or compare results) and we also do a quarterly walk-the-store project to gain any additional feedback that could help us understand why the satisfaction scores are low.

Have a space to record and track feedback

There can be several spaces where you record and track feedback. For instance, I have used a dashboard in the past to track the quantitative side, and a Miro board to analyze the qualitative feedback on an ongoing basis.

Depending on the scope of the project and the needs of my stakeholders, we could look into this every two weeks, month, or quarterly. I like to look at the satisfaction scores over a month and add in any feedback to the Miro board so I can continuously track and synthesize information into action.

When it comes to the Miro board, I usually use that journey map that we created above as a way to categorize and order feedback. So, if people are struggling with something in the “compare tickets” phase, I will place the feedback under there with any recommendations or action items.

For example, at TeamTicket, let’s say we’ve recorded our monthly satisfaction scores and are organizing the qualitative data. If we heard that participants are struggling to filter down their choices and don’t have the necessary filters, that would go under the “compare tickets” phase. In that, I would recommend either we dive into more pointed research (if we need it) or improve the product by adding the necessary filters.

Make improvements and take action

The best thing you can do with this data is take action. I’ve seen a lot of customer satisfaction data sit unused because it’s not easy to act on. However, by using the above structure, you ideally can pinpoint areas of concern and improvement.

If the improvements are obvious (such as the filter example above, if we understand the necessary filters and can easily make the change), then go ahead and recommend the work that should be done.

However, if the changes are more complex, I would recommend running an ideation workshop or an internal hackathon to solutionize within the problem space.

For example, at TeamTicket, we already identified the necessary filters and could easily make that change. However, we also identified that our confirmation email got easily lost in the inbox and didn't have the necessary information. Therefore I pulled the team into an ideation session to consider the different ways we could solve the pain point and issue.

For example, at TeamTicket, let's say we've recorded our monthly satisfaction scores and are organizing the qualitative data. If we heard that participants are struggling to filter down their choices and don't have the necessary filters, that would go under the "compare tickets" phase. In that, I would recommend either we dive into more pointed research (if we need it) or improve the product by adding the necessary filters.

Acknowledge and record your progress

Most importantly for all of this is acknowledging and tracking your progress over time! This is why periodic intervals of testing can be so helpful, especially if you make major changes to the product. If you run a quarterly SUS and improve the product during the quarter, you should see an increase in scores.

When it comes to case studies, showing your impact is hugely important and keeping track of customer satisfaction over time is an excellent way to demonstrate the impact your research had on an organization!