



Customer Satisfaction Process Guidelines

The properly operating customer satisfaction process creates value by adapting the organization to its customers. This produces a prosperous win-win situation. Make your customer satisfaction process operate at full strength by following these guidelines.

1. Be Practical – Address the Existing Situation

- a. Connect the customer satisfaction process to existing goals and priorities
 - i. Strategic plan, strategic marketing plan, brand or product plan
 - ii. Lean management
 - iii. Balanced scorecard
 - iv. Total quality, customer driven quality, ISO quality, Baldrige quality
 - v. Customer value, customer focus, customer service, customer retention
 - vi. New products, product design, engineering, product usability
- b. Learn what problem customers are expecting your product to solve for them
- c. Learn what improvements customers would most appreciate

2. Involve Managers

- a. Identify managers of each company process that touches your customers
- b. Ask touchpoint managers what they want or need to know about customers

3. Conduct Actionable Research

- a. Design and carry out the study so it produces reliable, accurate information
- b. Analyze results statistically so they can be relied upon
- c. Report results clearly and quickly to the touchpoint managers

4. Select Leverage Points

- a. Protect (improve): important or strategic items that have low satisfaction
- b. Differentiate (promote): important or strategic items with high satisfaction

5. Initiate Satisfaction Projects

- a. Develop project charters, missions and rationales
- b. Compute benefit/cost estimates
- c. Establish success metrics
- d. Gain authorization to proceed with specific projects

6. Coordinate Satisfaction Projects

- a. Select teams and project managers
- b. Fund projects
- c. Carry out projects and provide progress reports

7. Manage a Satisfaction Program

- a. Link projects using an overall Satisfaction Program Report or Dashboard
- b. Track project benefits, costs and success metrics with post completion audits
- c. Note the program's overall effect on your product, service or brand