

YOUR CX | STOP COLLECTING. START FIXING.

BUILD A VOICE OF CUSTOMER SYSTEM THAT DOESN'T SIT IN A SPREADSHEET.

WHAT'S INSIDE THE TOOLKIT?

VoC Strategy Planner Template

Define your feedback goals, channels, timing, and usage in one simple worksheet.

Survey Question Builder Template

Pre-built templates for NPS, CSAT, CES, and open-ended feedback—ready to copy and paste.

Feedback Channel Matrix Template

Plan where, when, and how feedback is collected across the customer journey.

Response Loop Checklist Template

Ensure your team follows up and acts on feedback consistently.

Monthly VoC Report Template

Organise results, track key metrics, and share insights with your team or leadership.

WHO IS THIS FOR?

- Small business teams building feedback programs
- Marketing and service managers looking to improve retention
- CX consultants and digital agencies
- Customer support teams looking to close the loop effectively

WHAT YOU'LL BE ABLE TO DO

- Launch a Voice of Customer program in days, not months
- Know which questions to ask — and when
- Collect feedback through the right channels at the right time
- Turn feedback into internal improvements
- Track and report on what customers really think

VOC STRATEGY PLANNER TEMPLATE

1. PURPOSE OF YOUR VOC PROGRAM

Why are you launching or improving your VoC program?

Example: Understand onboarding issues, reduce churn, drive loyalty, improve support.

2. TARGET AUDIENCES & PERSONAS

Who will you collect feedback from?

List key customer types or segments (e.g. new users, long-term clients, churned users).

3. FEEDBACK OBJECTIVES & QUESTIONS

What do you want to learn?

Example questions: How satisfied are they? Where is friction? What would improve their experience?

4. FEEDBACK COLLECTION METHODS

Which tools and methods will you use?

Options: Email surveys, in-app widgets, phone interviews, social reviews, chat transcripts.

5. FEEDBACK TRIGGERS & TIMING

When will you collect feedback?

Examples: 1 day after signup, 7 days post-purchase, quarterly NPS, post-support ticket.

6. VOC METRICS TO TRACK

Which KPIs or indicators will you track?

Common: CSAT, CES, NPS, Volume of feedback, Themes, Sentiment trends.

7. ANALYSIS & INSIGHT SHARING PLAN

Who will analyse the feedback and how often?

How will insights be summarised and shared across the company? (e.g. weekly report, monthly dashboard)

8. CLOSING THE FEEDBACK LOOP

How will you respond to customers who give feedback?

Plan proactive follow-up, internal updates, and customer communications.

9. ROLES & RESPONSIBILITIES

Who owns each part of the VoC process?

List names or departments for survey creation, reporting, follow-up, and improvement actions.

10. LAUNCH PLAN & REVIEW CADENCE

When will this strategy go live?

How often will the plan be reviewed and updated? (e.g. quarterly review)

SURVEY QUESTION BUILDER TEMPLATE

1. DEFINE YOUR SURVEY GOAL

- What do you want to learn from this survey?
- **Examples:** measure satisfaction after onboarding, identify friction in checkout, assess product usability.

2. CHOOSE THE RIGHT QUESTION TYPES

- Rating Scale (e.g. 1–5, 1–10) – for satisfaction, effort, likelihood questions
- Yes/No – for binary clarity, decision points
- Multiple Choice – to segment types of responses
- Open-Ended – for detailed customer input and ideas

3. SAMPLE QUESTIONS BY JOURNEY STAGE

Awareness Stage:

- How clear was our website or landing page? (Scale)
- What information were you looking for but couldn't find? (Open-ended)

Consideration Stage:

- What almost stopped you from signing up today? (Open-ended)
- How easy was it to compare our options? (Scale)

Purchase Stage:

- How easy was it to complete your purchase? (CES)
- What could we do to improve your buying experience?

Onboarding Stage:

- How confident do you feel using our product/service? (Scale)
- What was the most confusing step of the setup?

Support Stage:

- How satisfied were you with the support received? (CSAT)
- Did your issue get resolved fully? (Yes/No)

Loyalty Stage:

- How likely are you to recommend us to a friend? (NPS)
- What has kept you coming back to us? (Open-ended)

4. BEST PRACTICES FOR VOC SURVEYS

- Keep it short – 3 to 7 questions max
- Start with easier closed-ended questions before open ones
- Always include an open-ended 'Is there anything else you'd like to tell us?'
- Avoid biased or leading questions
- Make responses anonymous unless follow-up is planned
- Use logic branching if possible for a tailored experience

5. POST-SURVEY PLAN

- Who will review the responses?
- How will open text comments be analysed (themes, sentiment)?
- What's the timeline for sharing results and acting on insights?

FEEDBACK CHANNEL MATRIX TEMPLATE

TOUCHPOINT	CHANNEL	METHOD	TIMING	OWNER	NOTES
Website					
Post-purchase					
Support					
Email Campaign					
In-store					

RESPONSE LOOP CHECKLIST TEMPLATE

1. CAPTURE & ACKNOWLEDGE

- Feedback is logged in the CRM, helpdesk, or tracking sheet
- Feedback is tagged by type and journey stage
- The customer receives confirmation that their feedback was received
- Contact information is linked or verified (if follow-up required)

2. ASSIGN OWNERSHIP

- Feedback is assigned to the correct team/owner within 24 hours
- Ownership is confirmed and SLA is in place for review/response
- Team members have access to context or conversation history

3. ANALYSE & PRIORITISE

- Feedback is reviewed and categorised (e.g., complaint, compliment, feature request)
- Similar issues are grouped and tracked for patterns
- Priority level is set (Low / Medium / High) based on impact and frequency

4. RESPOND & RESOLVE

- Response is personalised and timely (within defined SLA)
- Resolution or next steps are clearly communicated
- Escalations follow a standard protocol if unresolved within SLA
- Customer sentiment post-resolution is noted if possible

5. LEARN & SHARE

- Feedback themes are added to a shared insights report/dashboard
- Learnings are discussed in cross-functional or CX team meetings
- Trends are documented and linked to actions/improvements

6. COMMUNICATE 'YOU SAID, WE DID'

- Positive actions taken are communicated back to the customer or audience
- Team is updated on actions taken to reinforce learning
- Relevant metrics (CSAT, NPS, etc.) are monitored for post-action impact

7. REVIEW & IMPROVE PROCESS

- Monthly/quarterly review of response loop effectiveness
- Check SLA adherence and adjust resource allocation if needed
- Celebrate wins or resolved themes with staff

MONTHLY VOC REPORT TEMPLATE

1. Reporting Month:

2. Summary Highlights:

Top wins, issues addressed, notable insights.

3. Feedback Volume Overview:

Total feedback items collected:

Source breakdown:

Surveys:

Support Tickets:

Reviews:

4. Top Positive Themes:

[Theme 1] – Example quote:

[Theme 2] – Example quote:

5. Top Negative Themes:

[Theme 1] – Example quote:

[Theme 2] – Example quote:

6. Metric Summary:

Month-over-month change:

CSAT:

CSAT __%

NPS:

NPS __ pts

CES:

CES __ pts

7. Notable Customer Quotes:

" ____ " (from __ channel)

" ____ " (from __ channel)

8. Escalated Issues or Complaints:

[Issue] | Status: [Open/Resolved] |
Owner: [Name/Team]

[Issue] | Status: [Open/Resolved] |
Owner: [Name/Team]

9. Actions Taken This Month:

[What was done in response to top themes]

10. 'You Said, We Did'

[How changes were communicated]

11. Priorities for Next Month:

[Planned improvements, pilots, surveys, follow-ups]

12. Recommendations & Notes:

[Suggestions for internal teams or leadership]

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**FIX THE EXPERIENCE.
GROW THE REVENUE.**

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