Worksheet: Translating Verbatims into Action

Qualtrics XM institute™

SUMMARY

There is an inescapable (and expected) gap between the *designed* experience – how people inside the organization intend an interaction to unfold – and the *delivered* experience – how the interaction actually unfolds from the customer's perspective. One way customer experience (CX) teams can surface and address these inevitable gaps is by using rich customer or employee verbatims to put themselves in the shoes of their customers and then identifying specific actions they can take to bring the delivered experience closer to the original design and customers' expectations. Use this worksheet to generate ideas for improving an experience by deconstructing and analyzing verbatims across four key areas.

FOUR STEPS FOR TRANSLATING VERBATIMS INTO ACTION

"Translating Verbatims into Action" is a practical exercise that CX team leaders can run with a group of colleagues. In this session, the group identifies potential experience improvement opportunities by diving deep into a single piece of customer or employee feedback about a recent in-person or contact center interaction. This activity has four steps:

1. **Step 1. Identify a suitable piece of feedback.** First, select a piece of feedback to examine. This feedback could come from a number of different sources, including open-ended survey comments, agent notes, 3rd party review sites, social media, contact center chat transcripts, etc. and could be either positive or negative. While negative feedback can be a great place to start as teams often find it easier to brainstorm from, we also recommend including positive feedback in these exercises as well to uncover areas of strength and recognize great employee performances. Regardless of the source or sentiment, it is critical that the verbatim you choose contains sufficient material to explore effectively. Once you have selected a piece of feedback, add it to the Step 1 box on page 2.

2. **Step 2. Add the key metric(s) that accompany the feedback.** Next, in the Step 2 box on page 2, insert any key metric(s) that might accompany the feedback, including measurements like star ratings, Net Promoter® Score (NPS), satisfaction, or customer effort. Using those scores as well as the content of the customer verbatim, identify whether the customer's experience is above, at, or below expectations. Consider things like internal targets for each metric, marketing or brand promises your organization has made, and the volume of similar comments you receive. This context should inform the improvement ideas you generate in Step 4.

3. **Step 3. Break down the feedback.** As a group, discuss how the customer likely perceived their experience across the four key areas and fill in the left-hand column on page 3. If the customer or employee didn't specifically mention one of the four areas, ask the group to put themselves in that person's shoes and imagine what they likely experienced given what they expressed. To break down the feedback, ask:
   a. *What did our customer see us doing*? What types of activities or behaviors did the customer observe while interacting with the organization? (e.g., employees talking together rather than serving customers)
   b. *What did our customer hear us saying*? What language, tone, communication style, etc. did the customer hear – either directly or overheard – during the experience? (e.g., agent did not apologize, cashier was rude)
   c. *What was our customer thinking*? What did this experience make the customer think to themselves? What perceptions or judgements did they form? (e.g., company goes above-and-beyond for customers)
   d. *How was our customer feeling*? How customers *feel* about an interaction has a significant impact on their loyalty. What specific emotions did the customer likely feel during this interaction? (e.g., uncertainty, confidence, frustration, relief, surprise, delight)

4. **Step 4. Brainstorm improvement opportunities**. You should now have a clear picture of what motivated your customer to leave the feedback they did. Using the Step 4 box on page 3, work through each of the four areas again, but this time ask the team what they would change to improve each area. Focus on actions each team member can take within their own working environment.

HOW TO USE

You can use this tool to:

+ **Build employee empathy.** Because this exercise requires employees to put themselves in customers' shoes, it helps build their empathy and make them more aware of how customers are likely perceiving their experiences.
+ **Isolate pain points.** This exercise not only helps pinpoint areas of friction but can also help surface internal processes or policies that are getting in the way of employees delivering positive experiences.
+ **Develop individual action plans.** As employees themselves are identifying specific ways they can improve customers' experiences within their roles, it makes it more likely they will follow through with the improvements.

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Step 1
Identify a suitable piece of customer feedback to explore.

Add customer or employee verbatim here...

Step 2
Add the key metric(s) that accompany the feedback.

Metric:			
Score:			

Think about the comments and experience scores in context. Are they above or below the expectations you, your team and your organisation set?

Add additional context here...

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Step 3	Step 4
Break down the piece of feedback.	Brainstorm improvement opportunities.
What did our customer **see us doing**?	What could customers **see us doing differently**?
What did our customer **hear us saying**?	What could customers **hear us saying differently**?
What was our customer **thinking**?	What would customers **think** after we make the above changes?
How was our customer **feeling**?	How would customers **feel** after we make the above changes?

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