Template: Closed-Loop Workflow Map

Qualtrics XM institute™

Original Resource: *How to Create a Closed-Loop Program*

SUMMARY

A closed-loop program refers to the collection of processes and practices that allow an organization to systematically follow up with individual customers who are affected by an experience. Implementing a successful closed-loop program requires multiple groups across the organization to both understand and carry out a series of follow-up activities, many of which require technical setup and integrations. Use this template to design, validate, and socialize a workflow map for your closed-loop program. For more information on how to build out the processes and practices that enable an organization to consistently close the loop with customers, check out the How-to Guide, How to Create a Closed-Loop Program.

9 STEPS TO BUILD A CLOSED-LOOP WORKFLOW MAP

A Closed-Loop Workflow Map provides an overview of the individual workflows you plan to build as part of your broader closed-loop program. To fill in this template:

+ **Step 1: Define overall closed-loop program objective**. Identify the explicit objectives of your closed-loop program. These objectives – which should be rooted in your broader business and brand objectives – will provide a North Star vision for people to align around and prioritize against. Include specific numbers wherever possible.
+ **Step 2: Identify workflow goal**. Describe the purpose of establishing a closed-loop process around a particular listening post. This will inform which customers you follow up with and how. Each of these workflow goals should support your broader closed-loop program objectives.
+ **Step 3: Select listening post and alert trigger**. Based on what you are trying to achieve – as well as which data sources exist and who is willing to partner with you – determine which listening post (e.g., relationship study, a post-event survey, social media comments) will anchor your closed-loop program, and then within that listening post, choose which specific question or keyword will trigger the closed-loop process.
+ **Step 4: Determine which customers to follow up with**. Depending on factors such as response volume, ticket owner capacity, and the maturity of your CX efforts, you may not be able to follow up with every single customer who activates the trigger. Define which specific customer segment you will close the loop with (e.g., severe detractors, high value customers, members of a strategically important segment).
+ **Step 5: Assign closed-loop ownership and relevant stakeholders**. Identify which internal teams and individuals will be responsible for following up with the customers who meet your defined criteria. This includes both the primary ticket owner leading follow-up efforts as well as relevant stakeholders who may also need to be alerted to the feedback.
+ **Step 6: Choose notification channel**. Ticket owners and stakeholders are more likely to participate in closed-loop activities if they are alerted within the systems they already use. Based on who is responsible for follow up activities, choose where you would like closed-loop notifications to appear. Note: this may require integrations across systems.
+ **Step 7: Specify follow-up action**. There are numerous channels you could use to respond to customers, including email, phone calls, SMS, in-app messaging, and social media. Based on available resources, customer preferences, closed-loop goals, and compliance or privacy factors, identify how the ticket owner should follow-up.
+ **Step 8: Set escalation criteria and owners**. Define escalation timeframes and identify which senior team member will be responsible for handling these escalations. You may want to define a second escalation level here as well, such as alerting an even more senior leader if the first escalation owner does not respond within 24 hours.
+ **Step 9: Identify root cause and learnings capture**. Capturing the root cause of customer issues, along with customer feedback and learnings from the closed-loop follow-up, are critical activities for surfacing, sharing, and addressing systemic CX issues. Determine how and where these findings will be documented as part of the process.

HOW TO USE

You can use this tool in a number of different ways to support your closed-loop efforts:

+ **Align and engage stakeholders**. Share this visual with business partners to capture, socialize, and verify the design of your closed-loop program to ensure that all key stakeholders understand and are prepared to support the process.
+ **Set closed-loop owner expectations**. Use this tool to communicate roles and expectations to the ticket owners, escalation owners, and other relevant stakeholders who are responsible for carrying out closed-loop follow-up.
+ **Share with technical partners**. Provide a completed version of this template to the technical groups (e.g., IT, VoC vendor) responsible for building out the technical aspects of your program (ticketing, alerts, workflow, integrations).

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Use this template to fill in your Closed-loop Workflow Map. You may need multiple copies of this page to capture all your workflows.

CLOSED-LOOP PROGRAM OBJECTIVE	

	WORKFLOW #1	WORKFLOW #2	WORKFLOW #3	WORKFLOW #4
WORKFLOW GOAL				
LISTENING POST				
ALERT TRIGGER				
CUSTOMER SEGMENT				
TICKET OWNER				
STAKEHOLDERS TO BE NOTIFIED				
NOTIFICATION CHANNEL				
ACTION TYPE				
ESCALATION TIME				
ESCALATION OWNERS				
ROOT CAUSE/ LEARNINGS CAPTURE				

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EXAMPLE: Completed Closed-loop Workflow Map for a B2C Fast Food company

CLOSED-LOOP PROGRAM OBJECTIVE	Respond to **100%** of all closed-loop triggers within **72 hours**, decreasing resolution time by **95%** and increasing NPS by **10 points**.

	WORKFLOW #1	**WORKFLOW #2**	**WORKFLOW #3**	**WORKFLOW #4**
WORKFLOW GOAL	Neutralize high-value detractors	Service recovery, digital containment	Service recovery, brand management	Service recovery, fix bugs
LISTENING POST	Annual NPS survey	Customer Support Journey Survey	Social Media Reviews	Website Active Intercept
ALERT TRIGGER	Detractors (NPS of 0 – 6)	Dissatisfied customers (CSAT of 1 or 2 on a five-pt scale)	PR-focused words: *safety, theft, clean*	Selected "encountered a problem on the website"
CUSTOMER SEGMENT	Loyalty Program Members	All customers	All reviewers	All visitors
TICKET OWNER	Loyalty Marketing Manager	Service Manager	Social Media channel owner	Digital team
STAKEHOLDERS TO BE NOTIFIED	CX team	Location GM, District Manager	Social Media team, Director Social Engagement	CX team, UX team, Marketing
NOTIFICATION CHANNEL	Email, Salesforce, VoC Program Dashboard	Email, Salesforce, Tableau, VoC Program Dashboard	Email, Slack, VoC Program Dashboard	Email, Slack, VoC Program Dashboard
ACTION TYPE	Personalized email	Call customer or email customer	Respond to comment with apology and invitation to connect	Live chat, personalized email if address is provided
ESCALATION TIME	72 hours	72 hours	72 hours	72 hours
ESCALATION OWNERS	VP of Marketing	Service Executive	Director Social Engagement, GM	Head of Digital
ROOT CAUSE/ LEARNINGS CAPTURE	Ticket owner records findings in ticket in VoC platform	Customer identifies root cause in survey; ticket owner adds learning to ticket	Ticket owner records findings in ticket in VoC platform	Customer identifies root cause in survey; ticket owner adds learning to ticket