Customer Information

Use your frontline reps to gather "customer intelligence"

Too many companies rely exclusively on customer surveys to obtain information about the needs, preferences, and satisfaction of their customers — and they need to get their frontline reps more directly involved.

Chip R. Bell, a service consultant and author of *The 9-1/2 Principles of Innovative Service*, suggests that while surveys can be useful, they tend to focus on quantitative information and tell you little about the emotional aspects of the customer experience. This is where your reps can help.

Bell argues that companies should "start talking with your frontline people about what they see and hear from customers. It's your frontline people who are interacting with customers — whether it's on the phone or via web chat or email. It's these folks who touch the customer and who have the greatest understanding of what they are all about."

So think of gathering customer intelligence as a general might think about gathering military intelligence, and use your frontline customer service reps as "observers or scouts who are out there on the front lines trying to figure out what is going on," Bell says.

Training your "scouts"

Bell suggests that by empowering customer service reps to act as scouts and to collect customer information you not only gain valuable insights for you organization, but you engage reps more completely in their work. "If reps are recognized and valued, talked to, and debriefed on what they are hearing from customers, they are going to pay more attention, and they are going to get the message that 'this is an important part of my job — listening and paying attention to the customer,'" he says.

In addition to listening, companies can also provide their frontline reps with the tools and methodology they need to "collect customer information in a way that is not intrusive to the customer, that does not disrupt the relationship, and that actually engages the customer in a way that the customer finds valuable," Bell says.

To collect information, Bell recommends using the following language to ask one simple question. "If I am on the phone with you, and at the end of the call I say, 'Mr. Smith, this has been a great conversation, and we are happy to be of service to you. If you have another 2 minutes, I have one question that I would like to ask you,' I guarantee the customer is going to say, 'Sure, go ahead.' And then if you ask, 'What is the one thing that we could do to improve our service to you?' the customer is going to answer that."

The question of handle time

When asking your frontline reps to ask questions at the end of a call, the goal is to make the questions quick, easy, and fun to ask — and to answer. And Chip Bell notes: "I know that a lot of organizations worry about handle time, but in general, you are not adding more than 30 seconds to the call, and even then you are gaining benefits."

One benefit is that when you get the customer to start giving you qualitative feedback, and you make changes based on that feedback, you are enhancing the whole service process, including call handle time in some cases.

And the other benefit, Bell says, "is that asking one question often reminds the customer of some other issue or question they had, and so you have eliminated a follow-up call."

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By asking one question at a time like this, and keeping it short and unobtrusive, Bell says, your reps will be getting valuable feedback from the customer that often isn't accessible through customer surveys. "Granted, some of that feedback will be qualitative and anecdotal," he adds, "but it is likely to be more authentic and probably much more accurate. It's like doing a focus group to supplement a survey, because now you get richer, more valuable information to flesh out the numerical data."

Asking the right questions

As noted above, Bell's favorite question is, "What is the one thing that we could do to improve our service to you?" But there are other variations as well — and you will want to mix up the question over time and address different concerns.

Another useful question is: "What is something that you would like to see us do that nobody in the industry is doing?" Or you can focus on an aspect of your business that makes you unique: "We really like our service when it is fun, and our customers say they like it when it is fun, so what can we do to make it more fun for you?" That way, says Bell, "you've anchored the question to some distinctive competitive feature that is unique to your organization."

Reps can also ask service recovery questions. For instance: "I know that sometimes we are not perfect. We make mistakes. Can you think of a mistake that we have made with you, and what could we have done to make it better?"

Another variation that Bell suggests is: "When you think about service, Ms. Smith, who would you say is the best service provider across all industries?" And if the customer says, "Zappos," you can follow up with: "What can we do to be more like Zappos?"

Customer effort is a big issue right now in a lot of customer service research, Bell says, so you might put that issue into the form of a frontline question by asking, "What can we do to take some of the effort out of this service process? How can we make it easier for you to do business with us?"

You can also have reps ask quantitative or rating type questions to validate your quantitative survey data. For instance: "On a one to five basis, with five being really super easy and one being entirely bureaucratic, what rank would you give us on our service?"

Closing the feedback loop

Of course, an equally important part of the process is to close the loop by letting customers know what you have done in response to their feedback, and also to let your frontline people know what changes you have made based on the data they have collected.

According to Bell, research shows that while 95 percent of companies collect information from customers through one means or another, only 10 percent actually make changes based on what they learn, and only 5 percent let the customer know what they did with that information. "No wonder most companies get such a low return rate on their surveys," he says, "because you've got a lot of people out there saying, 'Why should I fill out your survey? I have done it before and nothing happens.'"

Bell adds: "It's not that we can do everything that customers ask for, but we have to let them know that we are listening."

It's just as important to let employees know about the changes that have been made as a result of customer feedback — especially feedback that they have helped to collect. "That tells them that as an organization you value your customers, and it encourages them to value those customers as well."

So, whether you use a customer newsletter, a bulletin board, or you post the news on your website or Facebook page, says Bell, "You want to let customers know that you are keeping up with their changing expectations by responding to their feedback. So I would find a way to telegraph it everywhere."

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