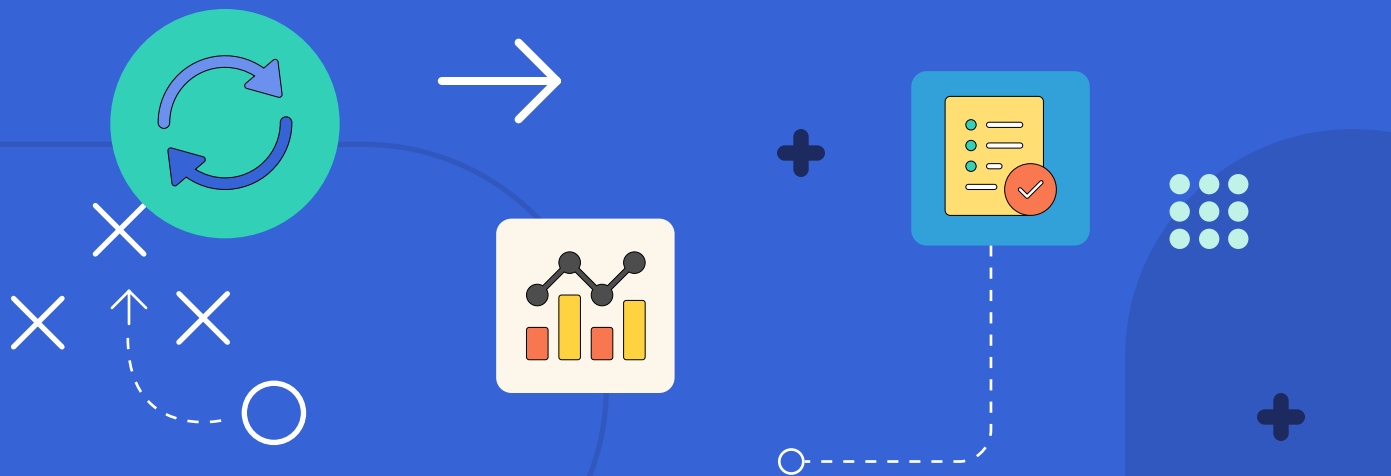


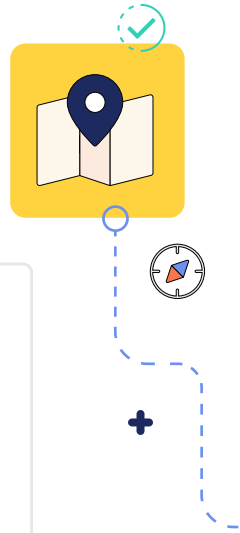
# Customer Listening Playbook

Use this step-by-step playbook to set strategic and actionable goals to connect with your customers and drive meaningful change in your organization.



## 1 Map the Current Customer Journey

Visualize the current journey you have in place for your customers. Take dedicated time to identify the critical touchpoints and channels of communication where the customer interacts with your organization from beginning to end.



## 2 Set Intentional Goals

Be specific and clear on what you would like to learn from conversations. Seek insights that stop a 'fire-fighting' mentality and help bring strategic value to improving the customer journey.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



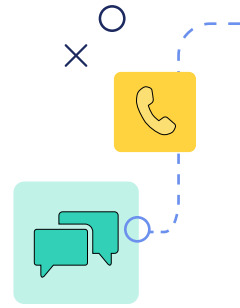
### 3 Collect Recorded Conversations

Gather a sample of interactions to evaluate. Interactions could include calls, chats, emails, texts, or online channels. Select a date range (we recommend a 2-week window) and collect a meaningful and representative sample of customer interactions to evaluate (we recommend starting with 1-2% for a given period or time). Keep in mind this may mean collaborating across departments to gather the exact data you're looking for.

Interaction sample size: \_\_\_\_\_

Plan for accessing customer interactions:

\_\_\_\_\_  
\_\_\_\_\_



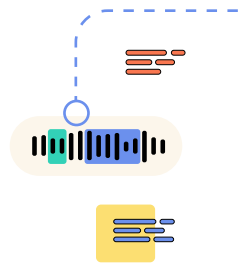
### 4 Listen to Customer Voices

Block your calendar so you can dedicate time to listening and taking notes about what is being shared during the conversation. Keep your identified goals in mind to help focus on rising problems or potential solutions. As you listen, pay attention, and take notes on what your customers are thinking, feeling, and experiencing.

I will listen to [#] \_\_\_\_\_ customers on [day] \_\_\_\_\_ at [time] \_\_\_\_\_ am/pm.

I will listen to [#] \_\_\_\_\_ customers on [day] \_\_\_\_\_ at [time] \_\_\_\_\_ am/pm.

I will listen to [#] \_\_\_\_\_ customers on [day] \_\_\_\_\_ at [time] \_\_\_\_\_ am/pm.



### 5 Aggregate & Analyze Insights

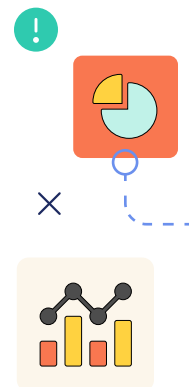
Compile your notes and look for common themes and trends across customer interactions.

Reasons customers are reaching out:

Customer & community concerns noted:

Brand perceptions (positives & negatives):

Agent performance (strengths & opportunities)



## 6 Take Strategic Action

Now that you have a better understanding of the customer experience, you can develop programs, processes, messaging, and more that respond directly to the needs of your customers. Show them you're listening by quickly taking action.

Problem \_\_\_\_\_

Solution \_\_\_\_\_

Problem \_\_\_\_\_

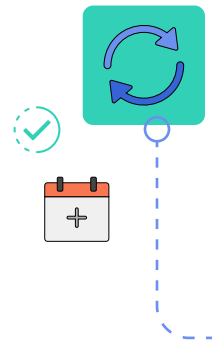
Solution \_\_\_\_\_



## 7 ...and Repeat

Customer needs and experiences are constantly evolving. Stay connected to your customer base by establishing a cadence for your new listening program (and block the time on your calendar).

I will listen to [#] \_\_\_\_\_ conversations every [frequency] \_\_\_\_\_

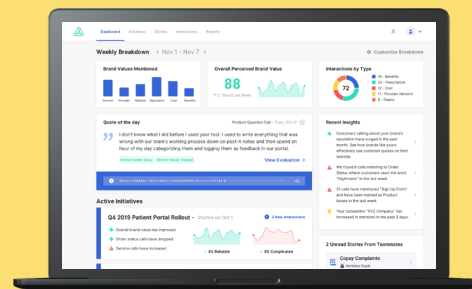


## ✓ The Takeaway

Conversations hold enormous value. Listening and then utilizing insights to take action can help motivate teams, improve current systems, and ultimately create a smooth customer experience. Don't be afraid to start small. Big change can come from a small first step.

## Listen at Scale. A Platform Built for Healthcare.

See Authenticx in Action →



We're on a mission to help humans understand humans.

Authenticx was founded to analyze and activate customer interaction data at scale. Visit our website to learn more: [authenticx.com](https://authenticx.com)



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