



Voice of the Customer (VOC) Templates

DATA COLLECTION PLANNING

Sources of VOC data can be broken into two categories: reactive and proactive. Reactive sources of data represent customer sentiment and opinion *after* interacting with a product, service, or brand.

Reactive data is often volunteered by the customers themselves in the form of support tickets, service or help desk calls, complaints, and other customer service feedback mechanisms. For this reason, reactive data is usually much more helpful in determining what customers consider to be defects within your product offering.

Often considered as a negative, reactive customer feedback can be an important (and abundant) source of customer sentiment. Complaints can uncover valuable insight into the ways in which a product or service is viewed or used by customers. Tracking the rise and fall of negative feedback can also validate the success of product changes or rollouts. A decrease in complaints regarding a feature that has been improved can be an indicator that the change was successful and well received.

Proactive data, on the other hand, is collected before the customer has experienced the product or service. Proactive data is the kind of data that is most often associated with market research—surveys, focus groups, and interviews. Gathering proactive data can be expensive; however, it can also head off costly development issues down the road. Knowing in advance when a course correction may be necessary can be invaluable.

SOURCES OF REACTIVE & PROACTIVE DATA

REACTIVE	PROACTIVE
Complaints and other Negative Feedback	Interviews and Focus Groups
Service Hotlines	Surveys
Tech Support or Service Desks	Feedback from Salespeople
Claims, Credits, or other Returns	Point of Use Observation
Sales Reporting	Market Research

COLLECTION PLANNING AND ASSIGNMENT

Any effective business undertaking must have goals and parameters and must be planned. The worksheet below is used to establish methodology and roles. Use the worksheet during the collection process, tailoring each section to the needs of your business and collection

Source of Data	Customer Segment	Amount of Data to Be Collected	Start Date	End Date	Who Will Collect Data?	Collection Method (survey, focus group, etc.)	Additional Info/Notes

DATA COLLECTION WORKSHEET

VOICE OF THE CUSTOMER DATA COLLECTION SHEET		CUSTOMER SEGMENT _____	
ID#	Customer Comment <i>What did the customer say?</i>	Customer Need <i>What is the underlying customer need?</i>	Critical to Quality Requirement <i>What resulting action is needed?</i>

Understanding VOC Data Collection

VOC stands for Voice of the Customer, and it is kind of a big deal. When we talk about Lean Six Sigma enterprises we're talking about value-added production. Value-added means production that incurs cost that can be passed on to the customer, or in other words, that creates value for the customer.

This process can't be based on guesswork.

Some waste (waste is the opposite of value-added production) can be easily detected. Waste events that occur as a result of failing to produce value for the customer can be harder to anticipate without a clear plan and information concerning the needs and expectations of customers.

Where does this information come from? From the customers themselves.

A developed process for gathering information that reflects the Voice of the Customer is essential to understanding what features a design team should focus on (this applies to both products and services) and how production (or the execution of a service) should produce these features.

Customer Segmentation Is Key

Before asking your customers about their needs, it is important to remember that not all customers are created equal. Customer segmentation is an important part of identifying who will be asked which questions; some customers are more valuable than others. Properly segmented customers will have questions tailored to their characteristics.

Some examples of segments are B2B customers, B2C customers, those who are segmented geographically, by gender, by enterprise size, etc. Keep this data in mind when analyzing the final results.

For example, if customers from a specific geographic region consistently ask for a specific feature, while customers from another do not, this information can be used to inform distribution and production operations.

GATHERING EFFECTIVE VOC DATA

Traditional VOC data-gathering efforts revolve around a few basic gathering methods:

- Interviews
- Point-of-Use Observation
- Focus Groups
- Surveys

Each of these methods each have strengths and weaknesses, particularly when you're looking at the extensiveness or completeness of the data provided versus cost. An effective VOC data-gathering effort should use multiple forms of data gathering to capitalize on the strengths of each form, cost permitting.

INTERVIEWS

Interviews are great ways to get in-depth insight through open-ended questions. They also offer unique perspectives that simply cannot be gleaned from observation or surveys. These perspectives are presented in the customers' own words and reflect their thoughts and opinions. On the downside, interviews are costly and require a high degree of planning and organization.

POINT-OF-USE-OBSERVATION

Point-of-use observation offers a slightly less in-depth look at customer preferences than interviewing those customers, but it is often slightly more cost-effective. One observer can report back many observations, instead of collecting information from one person at a time.

Point-of-use observation is also a good collection method because it provides insight about the ways in which customers use products "in their natural environment" so to speak. This is insight that may be lost in an interview setting and is hard to come by through surveys.

FOCUS GROUPS

Focus groups are also a much more cost-effective way to gather VOC data than interviews. The ratio of data collector to customer is much lower, so, like point-of-use observation collection, a single collector may be able to gather data from multiple customers faster than doing interviews.

Like interviews, focus group data gathering produces deeper insight than surveys or observation, and it has the added benefit of several different views being presented simultaneously. These groups can all be part of a single segment, or they may be mixed segments, further increasing the variety of unique perspectives presented.

The drawback, however, is that within a focus group setting it can be difficult to dive deeper into information provided by individuals.

SURVEYS

The most cost-effective method of VOC data collection is, far and away, surveys. Customer surveys can be sent to forty customers or four thousand for relatively low cost. They have the ability to reach customers that would otherwise prove impractical to interview or observe, and with the aid of surveying software, questions can be tailored to various customer segments.

What really sets surveys apart is that they provide mountains of quantitative data.

While other forms of VOC data collection provide qualitative or non-numerical data in most cases, surveys are ideally suited to be crunched through statistical programs. The drawback, of course, is that surveys don't provide the same level of insight as observation or interviews, and they can be impersonal. Plus, surveys tend to yield only the information that is requested, whereas an interview may uncover insight that the data collector never expected.

interviews <ul style="list-style-type: none">• Unique Perspectives• Open-Ended Questions• In-Depth Insight	point-of-use observation <ul style="list-style-type: none">• Customer Perspective• Observe Customer Interaction with Product & Brand• Interaction Occurs in "Natural Environment"
focus groups <ul style="list-style-type: none">• Cost-Effective vs. Interviews• Group Environment Means Unique Perspectives• Can Be a Single Segment or Mixed	surveys <ul style="list-style-type: none">• Very Cost-Effective• Quantitative Data• Large Amounts of Statistically Actionable Data

THE KEY IS VARIETY - AND REFINEMENT

Knowing where each method excels and where it comes up short should make it clear that the best VOC data collection results come from VOC efforts that use a variety of collection methods. To help you decipher which methods are best for you, here is a handy chart that compares each of the collection types:

Each of the various VOC data collection methods have their strengths and weaknesses. All of this information is important, but one of the most important aspects to remember is that the information provided by VOC data collection efforts must be actionable. This often means refining questions and objectives to elicit the "best" answers from customers. This doesn't mean introducing bias into the results, but it does mean getting past some of the communication issues that may present themselves that can make collected data less than useful.

Take a look at the following example of a customer's answer to a question about a product.

"I feel like I'm not getting a good value."

There is not any solid information in that statement. Value implies price-related concerns perhaps, but there's nothing to go on. VOC data collectors should be pondering how they can coax more information out of customers. After a follow-up, that statement can evolve into something like this:

"I feel like I'm not getting a good value because the price of this product is not competitive."

That's better, but it still leaves a lot of room for interpretation. Competitive compared to what, and what would be a good value?

"I feel like I'm not getting a good value because the price of this product is not competitive. It is higher than the price of a comparable product by nearly 20 percent."

The third iteration of that sentence tells us something we need to know, and it provides a quantifiable piece of information as well. Whether or not the organization acts on this information by decreasing the price is up to the decision makers, but in this aspect, the VOC data collection will have done its job.

initial statement	underlying cause	key attribute	refined goal
"I feel like I'm not getting a good value."	Price-Related Concerns	Price is higher than the competition by 20%	Reduce price to customer by <i>at least</i> 20%
"This is a good product that functions well."	Feature-Related	Lasts for entire lifespan	Maintain lifespan of 3 years/30,000 cycles
"I wish there was more functionality."	Feature-Related Concerns	Cannot easily collaborate with other users worldwide	Increase global compatibility and match product to popular platforms

THE BOTTOM LINE

The bottom line is that VOC collection methods are too important to your organization (Lean, Lean Six Sigma, or otherwise) to perform incorrectly. As wide a variety of data-gathering methods should be used as is possible on your organization's VOC budget, and follow-ups should be made where necessary. The overall goal of a VOC collection effort should be to obtain actionable information, the kind that can inform production in meaningful ways.

They are your customers, after all; it's probably a good idea to listen to them.