OPERATIONS INSIDER

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CUSTOMER SATISFACTION MEASUREMENT QUICK START CHECKLIST

Score the way you measure customer satisfaction in one hour, with records you can point at.



ASK. READ. ACT. TELL THEM.

START HERE

How to Use This Check

One hour with sales, quality and logistics at one table, twenty-five statements, one number.

01 LOOK	02 SCORE	03 ACT
Open what exists: the last survey and its report, the customer list, the action list, the delivery and complaint figures and the scorecards your customers send you.	Score each statement from 0 to 4. Without a list, a report or a record you can point at, the score is 2 or lower.	Pick the weakest block and agree one action with an owner and a date before you leave.

The Scoring Scale

POINTS	MEANING
0	Not in place.
1	Happens occasionally, depends on individuals.
2	Partly in place, not consistent across customers or functions.
3	Mostly in place and visible in the data.
4	Consistently in place, visible, reviewed and improved.

> **WHY MEASURE AT ALL**
>
> **In industrial business a handful of customers carry most of the revenue, and they rarely complain before they move volume to someone else. Asking them in a structured way, and comparing the answers with your delivery data, shows the risk while there is still time to act.**

Before You Start

- **Scope:** one business unit or one plant with its own customers.
- **Evidence:** customer list with revenue, the last questionnaire, results by customer, the action tracker, on-time delivery and complaint figures of the last twelve months.
- **Tone:** you check the system, not the sales team. Ask what the customers were told after the last survey.

THE CHECK

01 Purpose and Scope

NO.	CHECK	SCORE 0 TO 4
01	The purpose of the measurement is written down, including the decisions that will be taken with the results.	
02	Three sources are used together: what customers say, whether they would recommend us, and hard delivery and complaint data.	
03	The customers for the survey are selected by a written rule that covers at least 80 percent of revenue and the customers with potential.	
04	For every selected customer, contacts from more than one function are named, not only the buyer.	
05	One person owns the measurement, and sales, quality and logistics have agreed on their part.	

02 Questionnaire and Fieldwork

NO.	CHECK	SCORE 0 TO 4
06	The questionnaire has no more than 15 questions and takes no more than 7 minutes, and this was tested before sending.	
07	Every rating question covers one topic only and uses the same scale with a name for every point.	
08	The questionnaire asks which topics matter most, and it contains at least one open question.	
09	The invitation comes from a person the customer knows, states the purpose and the time needed, and promises feedback on the results.	
10	The response rate is tracked per customer class during the fieldwork, and missing class A customers are called.	

THE CHECK

03 Analysis

NO.	CHECK	SCORE 0 TO 4
11	For every criterion the number of answers, the mean and the share of low ratings are reported, not the mean alone.	
12	Importance and satisfaction are shown together, and the criteria to act on first are named.	
13	Results are split by customer class and by function, and groups with fewer than 10 answers are marked as such.	
14	Changes between two waves are read against the range that chance alone can explain.	
15	Every customer with a critical answer is known by name, with its revenue, within one week after the survey closes.	

04 Action and Feedback

NO.	CHECK	SCORE 0 TO 4
16	Every result that calls for action has an action with an owner and a date in one tracker.	
17	Every critical contact receives a personal call within two weeks, and the call is recorded.	
18	All invited contacts receive a short summary of the results and of the actions within six weeks.	
19	Class A customers get a review meeting in which their own results and actions are agreed.	
20	The status of the actions is reviewed monthly by the management until all are closed.	

THE CHECK

05 Rhythm and Hard Data

NO.	CHECK	SCORE 0 TO 4
21	The survey is repeated in a fixed rhythm with the same core questions, so that waves can be compared.	
22	On-time delivery, complaint rate and response time to complaints are reported monthly with written definitions.	
23	The supplier scorecards that customers send are collected in one place and compared with our own figures.	
24	Where a customer measures our delivery differently than we do, the definition is clarified and both figures are reported.	
25	The management receives a report on one page after every wave and decides on priorities and resources.	

Your Result

BLOCK	POINTS	OUT OF
01 Purpose and Scope		20
02 Questionnaire and Fieldwork		20
03 Analysis		20
04 Action and Feedback		20
05 Rhythm and Hard Data		20
TOTAL		100

YOUR RESULT

Read the Number

The total tells you how much you know about your customers and how much you assume. The weakest block tells you where to start.

TOTAL	WHAT IT MEANS	WHAT TO DO FIRST
0 to 39	Assumed. Satisfaction is what sales reports from the last visit.	Write down the purpose. Select the customers and the contacts.
40 to 59	Asked. A survey exists, but it is long, rarely answered and seldom followed by action.	Shorten the questionnaire. Track the response by customer class.
60 to 79	Understood. Results are split, priorities are clear, actions have owners.	Tell the customers what you do. Add the hard data and the scorecards.
80 to 100	Acted on. Waves are compared, customers get feedback, the management decides.	Hold the rhythm. Use the results in account planning.

Your Three Priorities

NO.	WHAT TO IMPROVE	FIRST ACTION	OWNER	DUE

Owner and date, or it did not happen. Repeat the check after every wave and compare the blocks, not the feeling.

What to Do Next

NEXT STEP	WHAT YOU GET
STARTER KIT	The guide for the first wave in six weeks, plus the survey workbook in Excel with customer list, questionnaire builder, response entry and results.
EXCELLENCE BUNDLE	The playbook, a two-day workshop pack, six templates, the Excel system with drivers, accounts, hard data, scorecards and waves, and a workshop deck.

Both are available at operationsinsider.com.