CHECKLIST

FEEDBACK COLLECTION SYSTEM



Checklist

CUSTOMER FEEDBACK COLLECTION SYSTEM SETUP

This checklist provides a systematic approach to establishing an effective customer feedback collection system that maximizes positive reviews while maintaining authenticity. Following these steps will help create a sustainable review generation process that builds trust and drives business growth.

1. System Foundation Setup

- ☐ **Map customer journey touchpoints**
  Create a detailed map of all customer interaction points to identify optimal feedback collection opportunities. This helps ensure no valuable feedback moments are missed.

- ☐ **Establish feedback tracking metrics**
  Define key performance indicators (KPIs) like response rates, sentiment trends, and review volume to measure system effectiveness.
- ☐ **Implement CRM integration**
  Set up a customer relationship management system to track preferences, purchase history, and interaction details for personalized follow-up.

2. Staff Training & Empowerment

- ☐ **Conduct psychology training sessions**
  Train staff on customer psychology and emotional triggers to help them identify prime moments for review requests.
- ☐ **Create response guidelines**
  Develop clear protocols for handling different types of feedback, including negative reviews and service recovery situations.
- ☐ **Implement authority protocols**
  Define staff empowerment levels for immediate issue resolution without requiring manager approval.

3. Technology Implementation

- ☐ **Set up automated monitoring**
  Install real-time feedback monitoring systems to catch issues before they become negative reviews.

- [ ] **Create multi-channel collection system**
  Implement various feedback collection methods (email, SMS, in-person) to maximize response rates.
- [ ] **Configure analytics dashboard**
  Set up reporting systems to track patterns, trends, and effectiveness of different collection methods.

4. Review Request Optimization

- [ ] **Identify golden moments**
  Map out optimal timing for review requests based on peak satisfaction points in customer journey.
- [ ] **Create personalization templates**
  Develop customizable request templates that can be tailored to specific customer experiences.
- [ ] **Establish follow-up sequences**
  Design automated but personalized follow-up protocols for non-responding customers.

5. Quality Control & Improvement

- [ ] **Create feedback analysis process**
  Establish regular review of collected feedback to identify patterns and improvement opportunities.
- [ ] **Set up response monitoring**
  Implement system to track staff response times and effectiveness to customer feedback.

- [ ] **Design improvement protocols**
  Create processes for translating feedback insights into actionable operational improvements.

6. Long-term Sustainability

- [ ] **Schedule regular system audits**
  Plan periodic reviews of the entire feedback system to ensure continued effectiveness.
- [ ] **Create evolution strategy**
  Develop approach for adapting system to changing customer expectations and new technologies.
- [ ] **Establish recognition programs**
  Design programs to acknowledge staff members who excel at generating positive customer feedback.