CXINDEX™

Best practices and pitfalls

Designing a VoC programme.

Metric selection, survey design, channel specific practice and how to drive response rates that hold up.

01 Executive summary

A well designed Voice of the Customer programme is a strategic asset. The goal is to turn feedback into action, drive continuous improvement and build loyalty, rather than simply to collect responses.

- A strong programme relies on a clear understanding of customer journeys, consistent metrics, and surveys designed for each channel
- Integration with CRM and CCaaS systems reduces friction, personalises surveys and drives action
- Keep surveys short, relevant and timely, with every question tied to a decision or an improvement

- Open ended feedback reveals context, root causes and insight that scores alone will never surface
- Response rates depend on timing, simplicity, channel relevance and trust signals
- Long surveys, redundant questions, poor integration and shifting metrics all weaken credibility

02 Customer journey mapping

Understanding the complete journey is essential before designing anything. Mapping shows every touchpoint, exposes friction, and tells you which surveys to send at which moments. Document all interactions online and offline, create a visual map of the sequence and the emotional states along it, and collaborate across departments so the map is accurate.

Journey maps also create shared understanding across the business, which is what stops a VoC programme from being seen as something the CX team does on its own.

03 Metric selection

Without clarity and consistency in what you measure you cannot compare results, track change or derive insight. Four principles.

Consistent across touchpoints Use identical questions where you can, standardise the rating scale, and make sure metrics align to goals that span every touchpoint.	**Continuous** Define baseline metrics meant to stay in use. Review them periodically and change them rarely, so the trend line survives.
Impactful Metrics must lead to action. Ask only what you can use to make a decision, and validate regularly that each one still earns its place.	**Integrated** Connect CRM and CCaaS data so you never ask what you already know, and so results feed back into operational systems.

04 Survey design

Structure and flow

- Begin with the objective, what you need to learn and why
- Keep transactional surveys to one to three minutes
- Use branching so respondents only see relevant questions
- Make sure the survey looks like your brand and works on a phone

Question design

- Direct, simple language with no jargon
- Consistent scales with clearly defined anchors
- Avoid asking what you already know
- Easiest question first, drop off risk questions near the top

05 Channel specific practice

Voice and IVR

Clear, concise scripts aligned to brand tone. Callers have often had a long interaction already, so aim for one to two minutes. The format restricts question types and branching, so be mindful of accessibility, and use call metadata such as agent ID and call reason to avoid asking what you already know.

SMS

Keep it very short. SMS is low friction and suits concise, closed ended question sets. Use a friendly, conversational tone. If you send a link to a longer survey, make it mobile optimised with minimal clicks, and embed questions in the message itself where possible. Make opt out easy and meet the regulatory requirements.

Online chat

Embed the survey in the chat window after the session, keep it very short, and tag it by whether the session was with a bot or a human. The questions should differ. Self service chat asks how easy it was to find the answer. Agent chat asks how well the agent helped. Link responses back to chat metadata so there is context for follow up.

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06 Open ended questions

Closed questions give you numbers. Open questions give you the reason behind them, and they signal to the customer that their voice matters. Place them after the core quantitative questions, limit them to one or two per survey, and use NLP to categorise and quantify verbatim feedback at volume.

> **Three that work in transactional surveys.** “How could we have made this interaction better?” “Is there anything you would like to share about your recent experience?” “Is there anything we could have done differently?”

07 Driving higher response rates

Timing and immediacy Send as close to the interaction as possible, while the memory is fresh. For high volume channels use just in time triggers rather than batching.	**Length and ease** Keep it to one to three minutes, cut anything you already know, and make the design mobile friendly and accessible.
Personalisation and relevance Personalise the invitation with name and interaction context, and use the channel the customer already used.	**Trust and clarity** Be transparent about how responses are used, state how long it takes, and set expectations to reduce abandonment.

Channel benchmarks

8–30% Email survey responses	**40–60%** SMS and short transactional surveys, in good conditions	**20–30%** In chat or in app intercepts

08 Common pitfalls

- Long surveys when fewer, sharper questions would do. More questions means higher drop out
- Asking what you already hold in CRM or CCaaS, which frustrates the respondent
- Mixing dissimilar interaction types in one survey without context, which muddies the data
- Drifting away from baseline metrics too often, which costs you trend continuity
- Collecting feedback and never acting on it, which teaches customers that nothing changes
- A generic survey across IVR, SMS and chat, which underperforms a channel tailored one every time

09 Action plan

A recommended sequence for launching or refining a programme.

01	Define objectives and touchpoints. What you need to learn, from which interactions, and what impact you expect
02	Select metrics. Two or three core metrics consistent across the major touchpoints
03	Design survey templates per channel, including one open ended question each
04	Build integration so triggers, pre population and context work properly
05	Pilot on one channel and one segment to test timing, wording, length and response rate
06	Review and optimise against drop offs, themes and response rate
07	Roll out across the major interactions and monitor data quality
08	Embed action linking into dashboards, alerts, cases and performance reviews
09	Track trends with continuous metrics across channels
10	Iterate quarterly with minor tweaks rather than wholesale change

A successful programme is less about how many questions you ask and more about how well you listen, integrate and act.