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| Prepare: |  | While observing: |
| [ ]  Discuss with the manager what you are observing and why so s/he understands how you’ll use the information to problem-solve. Focus on this as an opportunity to learn what currently happens with customer feedback.[ ]  Talk with the team about what you are observing and why so they understand how you’ll use the information. Ensure the team knows you are not “auditing” them.[ ]  Plan to spend at least 30 – 60 minutes at the workplace observing.  You may try several shorter periods of observation (15 – 20 min).[ ]  Choose times and locations that will allow you to observe the work being done. You may try to observe a team huddle or meeting to capture that particular dynamic.[ ]  Bring paper and pencil to document what you see and hear. |  | [ ]  Focus on what actually occurs, not what should occur.[ ]  Be an unbiased observer, not an inspector.[ ]  Pay attention to interactions, both verbal and nonverbal.[ ]  Record what you see and hear, along with any observable standards/expectations. |

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| What to look & listen for – define your own indicators of ‘how you will know’ (phrases, behaviors, visuals, etc.) the answers to the questions: |
| [ ]  Do employees clearly understand who the customer is? Do they understand how the customer defines value? Look/listen for: (ex.: visual showing the customer, value stream map, employees’ answers to questions, team discussions about customers, customer survey data)[ ]  Do employees ask customers for feedback? How? How often? What is captured? Look/listen for: (ex: verbal request for feedback, specific information requested/documented by employees, percentage of interactions where feedback is requested) [ ]  What do employees do with customer feedback? Do teams discuss it? How? How often? What happens before, during, and after? Look/listen for: (ex.: employee response – verbal or otherwise – to feedback, location(s) to find/share feedback, amount of time devoted to discuss feedback, length of time between capture and discussion/sharing, standards – posted or spoken – related to customer feedback)[ ]  Is there visible evidence that customer feedback is captured? Shared? How? How often? Look/listen for: (ex.: poster or white board to post key feedback, posted performance targets and actuals for feedback, frequency of teams visiting/discussing visuals/data)[ ]  Is there visible evidence that employees use customer feedback to improve processes? Look/listen for: (ex.: value stream map, visuals showing how prior feedback has improved the process) |

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| Optional activity: |
| [ ]  Ask some employees (one-on-one) about their last experience with customer feedback to find out what happened. |

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Observations:

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Draw a picture of current state (what you see and hear actually happening):

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Reflect on what you observed. Questions to consider include:

* How does actual practice compare to standards/expectations?
* What appears to be “the process” for encouraging, soliciting, capturing, and using customer feedback?
* What does the feedback loop from customers to employees look like? How short and direct is the loop? How usable is the feedback? Provide specific examples from your observation.

Use your reflections to enhance your current state drawing and identify a specific problem to be addressed first. This will inform the “Observe” step on the Problem-solving worksheet.

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