



# BizHealth.ai

YOUR BUSINESS HEALTH ANALYST

80%

of leaders think they  
deliver great CX...

24%

of customers agree

## Customer Feedback Collection Checklist

### Why This Checklist Matters

Your customers hold the truth about your business—what's working, what's breaking, and what opportunities you're missing. Yet most business owners never systematically collect customer feedback.

**The Result?** Blind spots become expensive problems. Opportunities go unnoticed. Decisions are made on gut feel, not data.

**This checklist changes that.** Use it to build a structured feedback collection system that transforms customer insights into business clarity and growth.

## 1 Preparation & Goals

*Set the foundation for meaningful feedback*

- ☐ Define your feedback goals: What specific decisions or improvements will customer feedback inform?
- ☐ Identify key feedback categories: product quality, customer service, pricing, delivery, user experience, or other priorities
- ☐ Choose your target customers: existing customers, lost customers, recent buyers, or long-term loyalists?
- ☐ Decide on feedback methods: surveys, interviews, focus groups, reviews, social listening, or direct conversations
- ☐ Set a collection timeline: one-time effort, quarterly cycles, or ongoing feedback channels

**ACTION:** Write down your top 3 feedback goals in one sentence each. This keeps your effort focused.

## 2 Survey & Question Design

*Craft questions that get real, usable answers*

- ☐ Keep surveys short: aim for 5–10 key questions (max 5 minutes to complete)
- ☐ Use a mix of question types: rating scales (1–5), yes/no, multiple choice, and open-ended
- ☐ Ask the hard question: "What's one thing we could do better?" or "What almost made you leave?"
- ☐ Include Net Promoter Score (NPS): "How likely are you to recommend us?" (0–10 scale)
- ☐ Avoid leading questions: don't prompt the answer you want to hear
- ☐ Test your survey with 2–3 real customers first: catch confusing wording before going live

**ACTION:** Write your top 5 questions now. Make sure each question answers a specific decision you need to make.

## 3 Choose Your Collection Channels

*Meet customers where they are*

- ☐ **Email surveys:** Use tools like Typeform, SurveyMonkey, or Google Forms for scalable collection
- ☐ **One-on-one interviews:** Schedule 15–30 minute calls with 5–10 key customers for deep insights
- ☐ **Post-purchase surveys:** Automate requests immediately after purchase or delivery
- ☐ **Review platforms:** Monitor Google Reviews, Yelp, Trustpilot, and industry-specific sites
- ☐ **Social media listening:** Track mentions, hashtags, and comments on your social channels
- ☐ **Customer feedback forms:** Add a simple form to your website or product
- ☐ Offer incentives (optional but effective): discount, entry to raffle, or free resource for completing survey

**ACTION:** Choose 2 channels to start with. Don't try to do everything at once.

## 4 Build Your Sample & Outreach

*Get real responses from real customers*

- ☐ Segment your customer list: separate by tenure (new vs. long-term), purchase value, or product line
- ☐ Target diversity: collect feedback from your happiest customers AND your most critical ones
- ☐ Aim for response rate: 25–30% is realistic; 50%+ is excellent
- ☐ Personalize your outreach: mention their purchase, reference a conversation, or acknowledge their loyalty
- ☐ Follow up once: send a reminder 3–5 days after initial request for non-responders
- ☐ Set a realistic timeline: give customers at least 1 week to respond

**ACTION:** Create a customer list with at least 50 people to survey. Quality over quantity.

## 5 Analyze & Synthesize Feedback

*Turn data into actionable insights*

- ☐ Quantify results: calculate percentages for rating scales and multiple-choice questions
- ☐ Identify themes: group open-ended responses by common patterns (quality, speed, price, support)
- ☐ Calculate your NPS: categorize promoters (9–10), passives (7–8), and detractors (0–6)
- ☐ Look for surprises: what feedback contradicts your assumptions?
- ☐ Separate signal from noise: focus on themes mentioned by 3+ customers, not one-off complaints
- ☐ Create a summary: 1-page document with key findings, top 3 opportunities, and priority actions

**ACTION:** Schedule 2–3 hours to analyze responses. Look for 3 clear themes you can act on.

## 6 Close the Loop: Action & Communication

*Show customers their feedback matters*

- ☐ Prioritize: choose 1–3 improvements you can act on in the next 30 days

- ☐ Assign ownership: who is responsible for each improvement?
- ☐ Set a timeline: when will each change be complete and visible to customers?
- ☐ Communicate back: tell survey respondents what you heard and what you're changing
- ☐ Thank them publicly: celebrate customers who participated and shared ideas
- ☐ Share internal results: make sure your whole team knows what customers want

**ACTION:** Send one email this week thanking customers and sharing what you're changing based on their feedback.

## 7 Build Ongoing Feedback Systems

*Make feedback collection a habit, not a one-time project*

- ☐ Establish a cadence: quarterly surveys, monthly check-ins, or always-on feedback channels
- ☐ Rotate channels: mix surveys, interviews, and social listening so feedback feels fresh
- ☐ Track trends: compare this quarter's feedback to last quarter's—what's improving or getting worse?
- ☐ Create a feedback dashboard: track NPS, response rate, and top themes in one simple view
- ☐ Designate an owner: someone on your team is accountable for feedback collection and follow-up
- ☐ Make it a team sport: share feedback in weekly or monthly team meetings
- ☐ Celebrate wins: publicize changes you made based on customer feedback

**ACTION:** Schedule your next feedback collection session 90 days from now. Put it on the calendar.

## Quick Reference: Feedback Collection Tools

<b>Survey Platforms</b> Typeform, SurveyMonkey, Google Forms, Qualtrics, Jotform	<b>Review Monitoring</b> Google Alerts, Mention, Brandwatch, Sprout Social
<b>Interview Scheduling</b> Calendly, Acuity Scheduling, Zoom, Google Meet	<b>Analysis &amp; Insights</b> Microsoft Excel, Google Sheets, Tableau, Looker Studio

## Ready to Transform Customer Feedback Into Business Clarity?

Understanding your customers is just one dimension of business health. Our comprehensive Business Health Assessment analyzes your operations, finances, customer experience, and growth potential—giving you a complete diagnostic of where your business stands and what to prioritize next.

**Start Your Business Health Assessment**



### The 5 Critical Gaps Destroying Customer Experience

<b>The Perception Gap</b>	You think you're delivering great service. Customers experience something different.
<b>The Communication Gap</b>	You think your messaging is clear. Customers are confused about what you offer.
<b>The Service Gap</b>	Your service standards don't match customer expectations.
<b>The Personalization Gap</b>	You offer standard service. Customers want personalized attention.
<b>The Feedback Gap</b>	You collect feedback occasionally. You don't systematically act on it.

☐ Read the Full Article: *"Stop Guessing What Your Customers Think: The Uncomfortable Truth About Voice of the Customer"*

[bizhealth.ai/blog/voice-of-customer-truth](https://bizhealth.ai/blog/voice-of-customer-truth)