

# Customer Debriefing Form

The purpose of this form is to help you conduct a customer debriefing, an informational conversation in which you probe to find out what the customer's views of your business really are. To use this form, simply follow the step-by-step instructions and read the scripts.

## 1. Explain what you want them to do and ask permission to proceed.

### Script:

I'd like to ask you some questions as part of our effort to talk to key customers and learn more about their viewpoint. We will be reviewing all the customer input we receive and incorporating it into our next year's improvement plan. This is a strictly informational discussion; it's not a sales call at all. But it will take a little of your time, I'd guess about ten minutes. Is that all right with you?

### Response:

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### How to handle their response:

- \* If it's not all right, ask if it is all right to reschedule later.
- \* If yes, then reschedule and start again at that time.
- \* If still no, then thank them very much for their time anyway, tell them you appreciate their business, and that they can call you any time if they have any comments, questions or suggestions. Then hang up @md quickly enough that they don't get irritated with the interruption!

## 2. Ask them about their general level of satisfaction.

### Script:

Thank you. My first question concerns your overall level of satisfaction with our products/services. How happy are you with everything right now?

**Response:**

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**How to handle their response:**

Write down what they say. If necessary, say, "I'm sorry, but can you give me a minute to write that down?" or even "I got the first part, about \_\_\_\_\_, but I missed the last thing you said. Can you repeat it?" People usually don't mind waiting for you to take notes because they are honored that you value their comments enough to write them down.

**3. Ask them for specific suggestions.****Script:**

Okay, thanks. Now, can you think of anything in particular that might make our products/services better? Anything that would increase your satisfaction?

**Response:**

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**How to handle their response:**

Write down everything they suggest.

**4. Ask them for details of any suggestion that you think deserves elaboration or explanation****Script:**

Could you tell me more about your idea to \_\_\_\_\_?

or

You said that \_\_\_\_\_. That interests me. Do you mind explaining that a little more?

**Response:**

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**How to handle their response:**

Capture details of any suggestions or complaints. Try to write down specific words or phrases they use which are different from what you use within the company.

**5. Ask for anything else they think you ought to know.****Script:**

Thanks so much for your input. It's really very helpful because we don't always know how our business looks from the customer's perspective. Now, is there anything else you can think of that we ought to know or take a look at?

**Response:**

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**How to handle their response:**

Again, write down any and all comments. Probe for details if necessary.

**6. Thank them for their help.****Script:**

Thanks so much for your help! I really appreciate your input. I'll make sure that everybody has a good look at your comments and suggestions, and I know they'll be helpful as we work on ways to improve our business.

**How to handle their response:**

Now, end the conversation, or if there was a specific, unresolved problem or complaint, go on to Step 7.

## 7. Deal with any specific complaints (if necessary).

### Script:

You mentioned a (problem/concern) that I'd like to follow up on. Can I just make sure I understood what the problem was. Is it that \_\_\_\_\_?

or

That's all I have to ask you for our research, but I noticed that you were not happy about \_\_\_\_\_. If you like, I can work on solving that problem for you. Would you like me to look into it and (get back to you/have \_\_\_\_\_ get back to you)?

### Response:

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### How to handle their response:

If your questions revealed a customer complaint, then you need to switch gears and offer to look into the problem and get back to them or have someone else get back to them to solve it. Now is your opportunity to recognize the complaint and deal with it.

End by making a specific commitment as to what you'll do, when, in order to work on solving the customer's problem. Then thank them again for participating in the research.

### Notes

Did you make any *promises* to this customer? If so, make a note of them here so you'll remember to follow through.

### Customer commitments:

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