[Organization logo]

[Organization name]

PROCEDURE FOR MEASURING CUSTOMER SATISFACTION

Code:	
Version:	0.1
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Date	Version	Created by	Description of change
	0.1	9001Academy	Basic document outline

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1. Purpose, scope and users

The purpose of this procedure is to describe methods for gathering and using information about customer satisfaction in order to establish a system for monitoring customer satisfaction and customer's perception of the degree to which their needs and expectations have been fulfilled.

This procedure is applied to all processes and/or areas (parts of the organization) within the Quality Management System (QMS) that establish communication and determine customer requests or receive customer feedback.

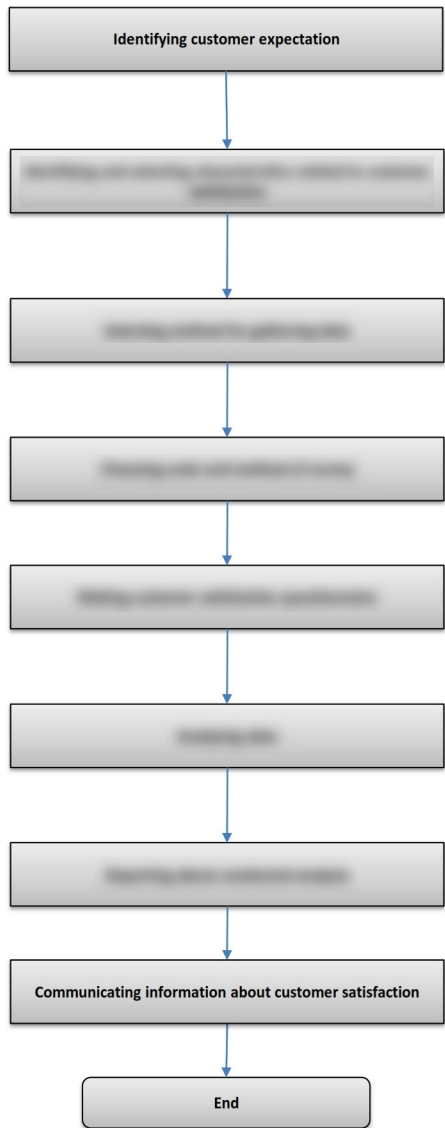Users of this document are [employees of Sales Department] of [organization name].

Commented [9A5]: Adapt to organization's practice.

2. Reference documents

- ISO 9001:2015 standard, clauses 9.1.2
- Procedure for Management of Nonconformities and Corrective Actions
- Procedure for Management Review

3. Establishing a system for measuring customer's satisfaction

3.1. Process flow

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3.2.   Identification of customer's expectations

When determining customer needs and expectations, [job title] must consider the following:

<div style="color:#888">Commented [9A6]: E.g. Sales Manager</div>

- Requests that customer stated through contract and accompanying documents
- Requests that customer hadn't stated

<div style="color:#888">Commented [9A7]: E.g. Product specification, order document, etc.</div>

- Customer requests that are implied
- Legal and regulatory requests

The customer doesn't have to specify all ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓ ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓.

3.3. Identifying and choosing characteristics that refer to customer's satisfaction

Characteristics can be grouped into categories and ranked according to their relevance to the customer.

- Characteristics of product and/or service

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- Shipment characteristics

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- Organizational characteristics

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3.4. Selecting method for gathering data about customer's satisfaction

[Job title] is responsible for gathering data about customer satisfaction, and it can be through a qualitative, quantitative or combined research method.

> **Commented [9A11]:** E.g. Marketing Manager

Qualitative research is conducted ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓ ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓.

[Job title] gathers information by detailed interviews with customers and discussion groups made of the most important customers.

> **Commented [9A12]:** E.g. Marketing Manager

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Quantitative research measures the level of customer satisfaction.

Interviews and questionnaires ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓ ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓ ▓▓▓▓▓▓.

> **Commented [9A14]:** E.g. Marketing Manager

> **Commented [9A15]:** Adapt to organization's needs.

[Job title] gathers this information at least [once a year].

> **Commented [9A16]:** E.g. Marketing Manager or Outsource company.

[Job title] verifies gathered data by checking the following aspects:

> **Commented [9A17]:** This is recommended dynamics; adapt to organization's needs.

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- Completeness of data; it is important to check completeness of data and to decide how to handle incomplete data,
- ~~Accuracy of data, it is recommended to confirm that number of survey respondents and survey method are consistent with wanted level of reliability.~~

3.5.   Choosing scale and method of survey

[Job title] determines the scale of the survey statistically, in order to ensure the level of accuracy. It is a compromise between desired accuracy and survey costs.

~~In the case of cumulative surveys, [job title] uses a small sample and it depends on a business decision. If the number of customers is relatively small, the survey is conducted on them all.~~

[Job title] must determine sampling methods in order to provide representative findings with regard to number of customers:

- ~~Method of random sampling is used when the group of customers is relatively homogeneous,~~
- ~~Method of stratified sampling is used to group customers into different categories, and then proportional samples are extracted in order to acquire information about every group of customers.~~

3.6.   Making questionnaire for evaluation of customer's satisfaction

3.6.1.   Choosing structure and formulation of questions

After determining what information is needed, [job title] groups questions into logical sections with ~~more questions, especially when there can be multiple answers. The order of questions is logical – from general to more specific questions.~~

When formulating questions, [job title] must:

- ~~Clearly define the question regarding who, what, when, where, why and how~~
- ~~Use common language~~
- ~~Avoid usage of ambiguous words~~
- ~~Avoid using words that can lead the examinee in another direction, or make him biased and lead him to the answers that the organization wants to hear.~~

The questionnaire can include questions that require descriptive answers.

3.6.2.   Establishing ranking system

According to information about customers delivered by [job title], [job title] delivers the questionnaire to customers. A five-point scale is used with offered categories. Customers return the ~~completed questionnaire by mail or email. When analyzing customer satisfaction, [job title] calculates an average score for each question, and the overall mean score, and enters them into the Monitoring Customer Satisfaction Record. After completing the survey, the Manager Representative~~

analyzes the results and reports about the results to [job title], who then develops a conclusion and decides to implement appropriate corrective and preventive actions if needed.

Commented [9A24]: E.g. Marketing Manager or CEO

Criteria for evaluating customer's satisfaction:

Commented [9A25]: Why adopt a five-point scale?

Total average mark on scale of 1 to 5	Level of satisfaction
4.5 – 5	High level of satisfaction
3.5 – 4.5	Satisfactory level
Less than 3.5	Unsatisfactory level

Commented [9A27]: Adapt this column and criteria if other scale is used.

Commented [9A26]: Adapt this column if other scale is used.

3.7.   Analyzing data about customer satisfaction

[job title] sends the Customer Satisfaction Questionnaire to all clients via email and collects results after a one week period. The number of questionnaires that have not been returned is included in the Report of Customer Satisfaction.

When data regarding customer satisfaction are gathered, [job title] analyzes them in order to acquire information, which includes:

- Level of customer satisfaction (in total or by categories of customers) and trends
- Characteristics of products and processes in the organization that can have significant influence on customer satisfaction
- Relevant information about products and processes of the competitors
- Areas that can be improved

Results of every survey are entered by [job title] into Monitoring of Customer Satisfaction in order to determine trends in customer satisfaction regarding each identified aspect of customer satisfaction.

3.8.   Reporting about conducted analysis

[Job title] documents results of the analysis in the Report of Customer Satisfaction, together with possible recommendations that can help the organization to identify areas for improvement, and delivers it to [job title]. The report should identify possible causes that contribute to customer dissatisfaction.

3.9.   Communication of information about customer's satisfaction

Information that affects the elements of customer satisfaction is reviewed by management and results are delivered to responsible persons in the organization in order to take actions that can lead to improvement. Depending on the nature of the information, the appropriate responsible person is notified.

Information can be delivered to:

- [redacted]
- [redacted]
- [redacted]
- [redacted]

> **Commented [9A28]:** Adapt and identify all departments and job titles that need to be notified.

4. Managing records kept on the basis of this document

| Record name | Code | Storage | | Responsibility |
		Retention time	Location	
Customer Satisfaction Questionnaire	PR.14.1	2 years	[office of [job title]]	[job title]
Report of Customer Satisfaction	PR.14.2	2 years	[office of [job title]]	[job title]
Monitoring of Customer Satisfaction	PR.14.3	2 years	[office of [job title]]	[job title]

> **Commented [9A29]:** If the record is in electronic form; write the name of the folder on [job title]'s computer.

5. Appendices

- Appendix 1 – Customer Satisfaction Questionnaire
- Appendix 2 – Report of Customer Satisfaction
- Appendix 3 – Monitoring of Customer Satisfaction