

Qualtrics CSAT Strike Team

I. Purpose

The purpose of this SOP is to provide an understanding of how the Customer Care team handles actionable Qualtrics CSAT Surveys of ratings 1-2 with comments and share trends to LT team.

II. Scope

This procedure strictly covers the process of the previous Premier Support team handling actionable items with ratings of 1-2 with comments, reviewing them for necessary follow-ups (**providing empathy or acknowledging customer feedback**), and missed opportunities from the agent initially handling the contact. This process is not a walkthrough for survey ratings of 3-5 with or without comments or any other form of survey.

III. Roles

- Customer Care Strike Team involves selected team members to oversee and follow up on Qualtrics CSAT Survey to document trends and appropriately respond to customers if missed opportunities arise from initial interaction.

IV. Materials

- Qualtrics CSAT Survey ZD View
- [Qualtrics Recap Email Template](#)
- [Qualtrics Summary Report Template](#)
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- [Follow Up Tracker 2022 Form](#)
- [Accommodations Guide 4.0](#)
- [Coaching Opportunities Submissions](#)



V. Overview

- Qualtrics CSAT Survey will send whenever a ticket is closed and has been closed for ~1 hour without a customer response. The link the customer is provided is active for 14 days, after that, it expires. The survey is shown below and will contain the questions asked of the customer to rate their experience.

What was your overall level of satisfaction with the below?

| | 1- Disappointed | 2 | 3- Satisfactory | 4 | 5- Outstanding |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| The Freshly Customer Experience team | <input type="radio"/> |
| How quickly we responded to your request | <input type="radio"/> |
| How easy it was for you to connect with us | <input type="radio"/> |
| The resolution that was provided to you | <input type="radio"/> |
| How knowledgeable our team was | <input type="radio"/> |
| How valued as a customer our team member made you feel | <input type="radio"/> |

Is there anything else you'd like to share about your experience?

- The survey is sent from Qualtrics into Zendesk where it will then email the customer attaching a Zendesk ticket number to it. Once the customer completes it, it'll come back through Zendesk and into Qualtrics (See screenshot below).



Ticket #7335060

Customer lisamwolfe@gmail.com

Agent Ron

The Freshly Customer Experience team 1

How quickly we responded to your request 2

How easy it was for you to connect with us 3

The resolution that was provided to you 1

How knowledgeable our team member was 1

2 How valued as a customer our team member made you feel

Issue not resolved. I was sent a snip pic of a ledger which was even more confusing than my original question, and I have an MBA

Process of *Feedback Rating Review Reviewing Survey Ratings of 1-2s With Comments*

- We attentively reviews= the survey ratings of 1-2s with customer comments (as shown in the screenshot above) and the initial interaction the customer had with the previous Customer Care Agent and determines if it is an actionable item.
- After we review the initial interaction the customer had with the previous Customer Care Agent and sees that an opportunity was missed, we provide a follow-up to the customer where we showcase empathy and provide a better explanation (solution) in hopes of remedying their previous issue and provide a better customer experience.
 - Missed opportunities are as follows:
 - Agent did not cancel order/subscription as promised
 - Agent did not correctly assist the customer with their main concern and or provide a better solution (see screenshot below)
 - Agent did not fulfill customers subscription management request such as:
 - Change Meals
 - Update Meal Plan
 - Change Delivery Address/Day
 - Apply Promo Code
 - Apply In-store credit if promised compensation
 - For Chats: Customer left the chat and no follow up email was sent



- At times customers will rate all questions with 1 & 2s (with/without comments) and those with comments, they may reiterate their issue even after the Customer Care Agent assisted them to the best of their ability and stayed within the Accommodation Guide.
 - These will be treated as non-actionable as we do] not compensate these negative reviews outside of the Accommodation Guide even after the customer was escalated to a TL/Sup and they assisted them to the best of their ability.

Feedback Ratings with 3-5

- When you encounter a survey with a rating of 3-5, review the ticket to ensure the agent took advantage of every opportunity with the customer or any aspect of compliance (This includes correctly logging the issue, accommodating accordingly, and following the necessary follow-up actions). If you find that both the agent had no area of improvement and no follow-up with the customer is needed, make sure to include that in the internal note and the Survey FU tracker.

VI. Instructions

- **Step 1:** Pull up Zendesk
- **Step 2:** Pull up ticket in view
- **Step 3:** Read negative customer concern
 - If there is no customer concern comment jump to next step
- **Step 4:** Review ticket associated with negative CSAT (with or without comment)
- **Step 5:** Validate the Customer's issue in Freshly Admin
 - Check that issue is logged correctly
 - Check that the accommodation is aligned with Accommodation Guide
- **Step 6.0:** If everything is aligned and accurate
 - **Step 1:** Enter ticket id into tracker
 - **Step 2:** NRN ticket in Private note on ZD Qualtrics response ticket with summary & outcome
 - **Step 3:** Update sections C & E and enter rationale as to why there was no response need on Tracker in column E
 - **Step 4:** If coaching opportunity for initial agent is needed, submit via [Coaching Opportunities Form](#) and fill out section F
- **Step 6.1:** If the ticket is NOT aligned or accurate due to associate error



- **Step 1:** Enter ticket id into tracker
- Step 2: Correct issue by logging accurate issue and/or issue correct refund/award (So long as it is necessary and within Accommodation Guidelines)
- **Step 2:** Respond to customer apologizing and explaining the issue
 - Note: We should never admit to a mistake, rather apologize for the inconvenience/confusion
- **Step 3:** Update sections C & E on Tracker and explain the resolution provided
- **Step 4:** If coaching opportunity for initial agent is needed, submit via [Coaching Opportunities Form](#) and fill out section F
- **Step 6.2 :** Once you complete the view through Zendesk, you can refer to the List of Low Scores report every day. You should be receiving this email every morning. You will be looking through the tickets and ensuring you have responded to all the tickets needing a reevaluation. This includes both the tickets with and without comments.
- **Step 7 :** Once you have reviewed both the Zendesk Views and Report for the day, you will want to finish documenting any trends, highlights, and tickets that require more evaluation [here](#).
- **Step 8 : After you complete the template form, you will send the same information in an email communication at the end of your shift to CXLEADERS@FRESHLY.COM (Remember to copy this [template](#) and fill out information within Gmail)**



End Of Shift Qualtrics Recap 11/8/22 AM Shift

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CX Leaders (cxleaders@freshly.com)

End Of Shift Qualtrics Recap 11/8/22 AM Shift



(00/00/00) - QUALTRICS: LIST OF LOW SCORES

↶ ↷ Sans Serif ▾ T T ▾ B I U A ▾ ⏺ ⏺ ▾



Note: If you are unsure if an Accommodation or resolution that was previously provided to the customer is accurate, reach out via #cx-negativefeedbackq&a