

THE CUSTOMER ALREADY TOLD YOU · CHAPTER SEVEN

The Field Manual

Twelve working pages, the demand sheet, the case trace, the call to the customer who left, the recovery card and the agreement, ready to carry into a room.

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THE LICENCE

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Chapter Seven of The Customer Already Told You. The whole book, with every chapter, is at business.hautelumiere.life/library/the-customer-already-told-you (DOI https://doi.org/10.5281/zenodo.23989055).

A NOTE BEFORE YOU READ

This work is offered for education and leadership development. It is not legal, financial, accounting, investment, medical or psychological advice; take the advice of a qualified professional who knows your circumstances. Companies and events are described from the public record as the author understands it; characterisations are the author's analysis. Examples are illustrative, and no particular outcome is promised to any reader.

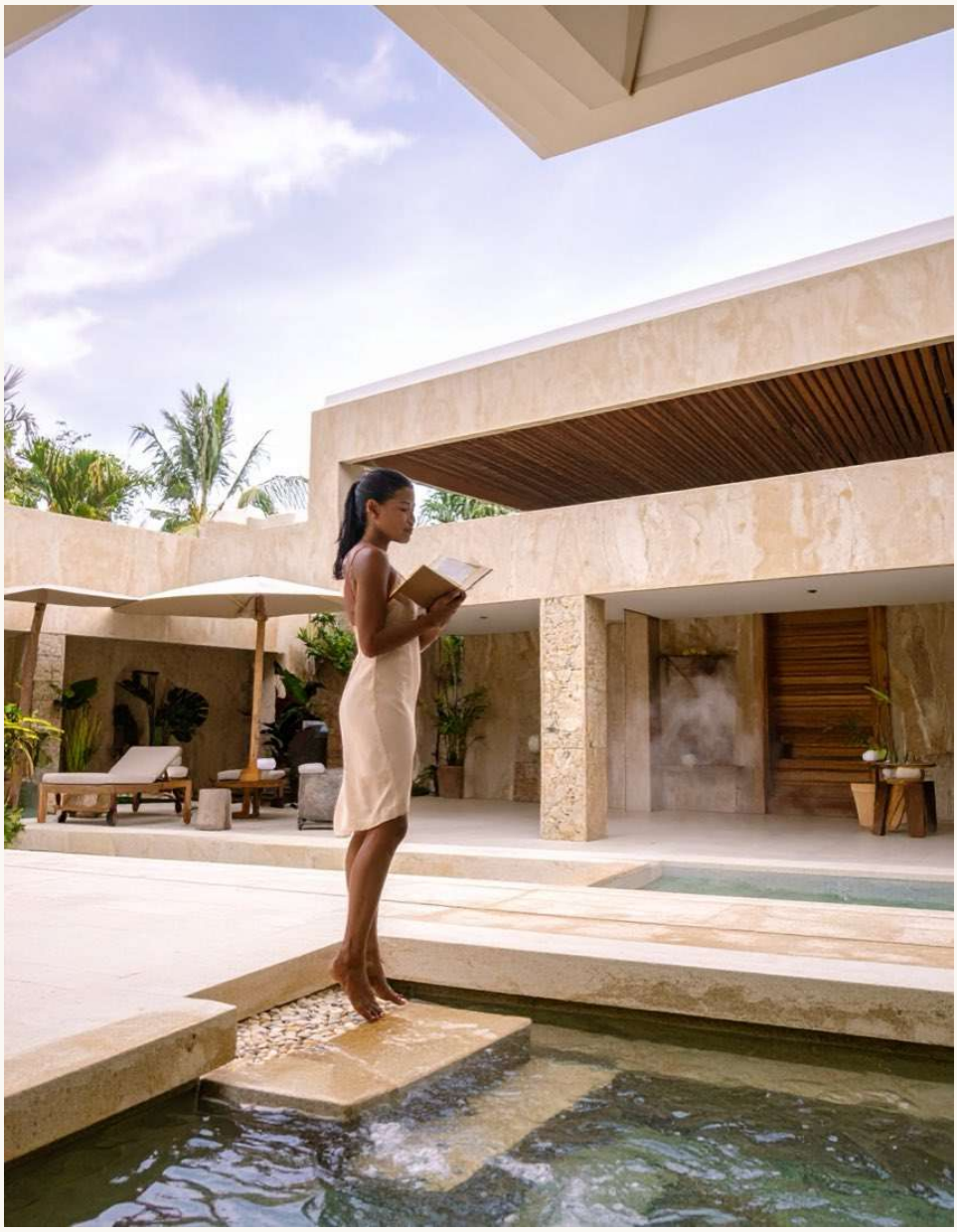
ABSTRACT

Twelve working pages, the demand sheet, the case trace, the call to the customer who left, the recovery card and the agreement, ready to carry into a room. The chapters of this book describe five practices as people doing them. This chapter holds the working pages: the sheets, the run sheets, the question sets and the one-page templates that the earlier chapters point to and do not print. Each page is meant to be photocopied, filled in by hand, and kept in a folder that the convenor of Chapter 6 looks after. Nothing here needs software. The pages follow the order of the first ninety days, which is also the order of the chapters. Each opens with a line saying where it comes from and when in the ninety days it is used. Where a page gives a script, the words are a starting point; say them in your own voice. Where it gives a time, the time is a planning guide from practice, not a finding.

CHAPTER SEVEN

The Field Manual

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The Field Manual

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How to use these pages

The chapters of this book describe five practices as people doing them.[31] This chapter holds the working pages: the sheets, the run sheets, the question sets and the one-page templates that the earlier chapters point to and do not print. Each page is meant to be photocopied, filled in by hand, and kept in a folder that the convenor of Chapter 6 looks after. Nothing here needs software.

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words are a starting point; say them in your own voice. Where it gives a time, the time is a planning guide from practice, not a finding.

Two rules govern the whole manual. Write down what the customer said, in the customer's words, not what the organisation would have preferred. And answer everything you collect: a call to a leaver with no second call, a line on the counter page with no answer, a recovery card nobody upstream reads, teaches customers and staff the opposite of what the practice is for.

What these pages do not contain is the design of any arrangement for sharing a gain: proportions, thresholds, timing or terms. Those belong to each organisation and the people it covers, and they are decided separately.

1 · The demand sheet

From Chapter 1. Used in days eleven to thirty, at every route customers use.

Listener: Route: phone / email / web / letter / counter / doorstep / other Date and session:

Fill one row per contact. No adviser's name goes on this sheet.

#	WHAT THE CUSTOMER WANTED, IN THEIR OWN WORDS	VALUE OR FAILURE?	IF FAILURE: KIND (SEE PAGE 2)	WHERE WAS IT MADE?

At the end of the session (twenty minutes, all listeners together). Read aloud every row marked *not sure*, agree how to sort it, and write the agreed rule on page 2 so the next session sorts it the same way.

2 · Sorting rules: value or failure

From Chapter 1. Kept with the demand sheets, and added to after every session.

The one rule. Sort from the customer's side. If the customer would not have needed to make this contact had the organisation done something, or done it right, it is failure demand, whatever the organisation's own targets say.

The kinds of failure.

KIND	IT SOUNDS LIKE	EXAMPLE
Chasing	*Where is …? When will …? You said …*	A repair still within its target time, but the tenant was not told when
Not done right	*It came, and it's wrong*	The corrected bill shows the same figure
Not understood	*What does this mean?*	A letter, bill or message that needs a call to explain it
Sent elsewhere	*They told me to ring you*	A customer passed from one team to another, and back
Repeat	*It's happened again*	The same fault as last month
Not sure		Discussed at the end of the session

Rules agreed so far (add one line each time a *not sure* is settled):

1. _____
2. _____
3. _____
4. _____

Mistakes to watch for. Sorting from inside (*she should have read the letter*). Hearing only the phone. Discussing an adviser by name. Turning the share of failure demand into a target.

3 · The cause tally and the ten-call rule

From Chapter 1. Used at the end of the fortnight of listening, and repeated at day ninety.

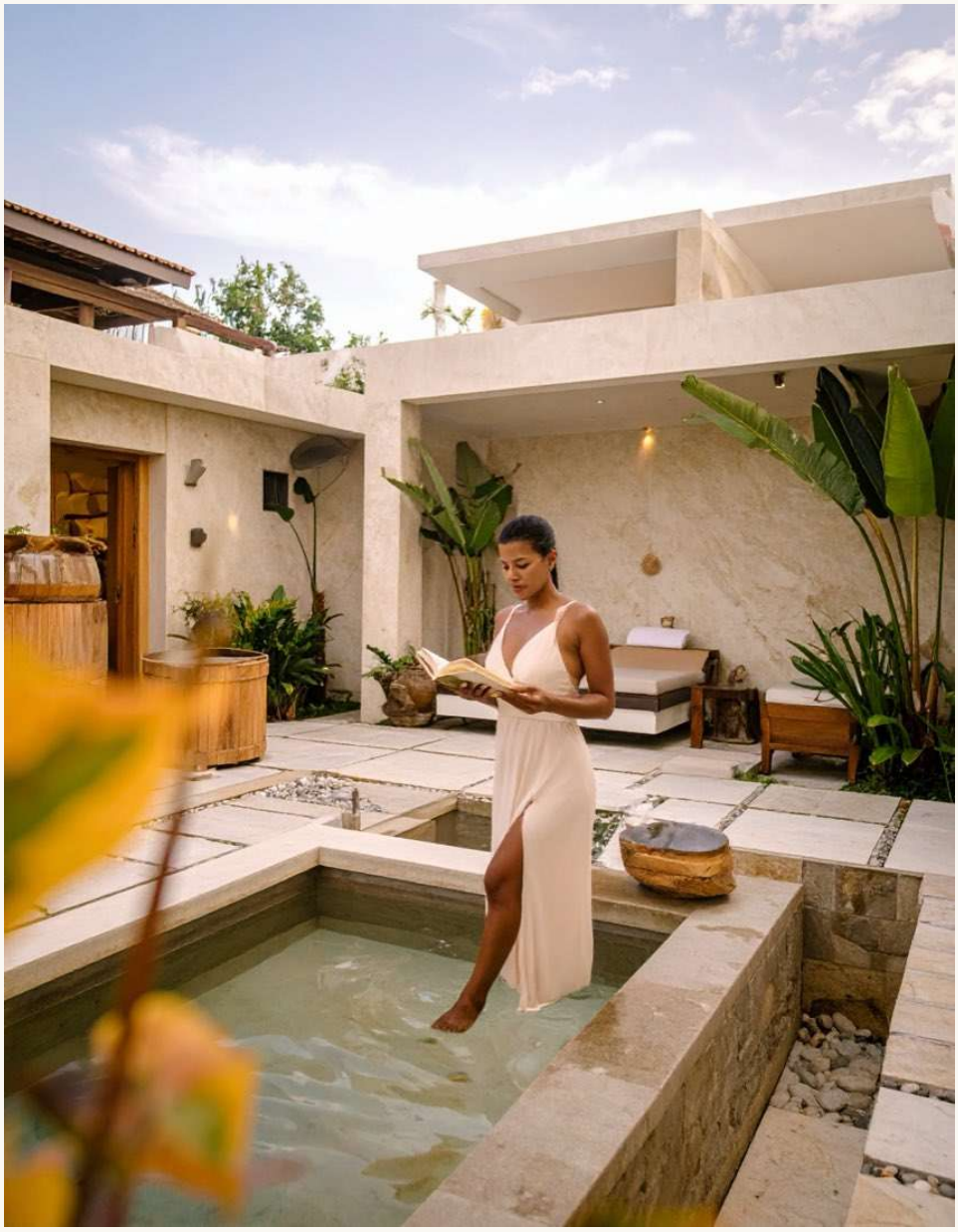
The tally. From all the demand sheets, count the failure demand by where it was made, not by who answered it.

WHERE THE FAILURE WAS MADE (SYSTEM, RULE, TEAM, DOCUMENT)	COUNT	OWNER	OWNER HAS LISTENED TO TEN CALLS? (DATE)	FIRST CHANGE, AND DATE

The ten-call rule. For each of the largest causes, ask its owner to listen to ten of the contacts it produces, from recordings or beside an adviser, before any change is discussed.

First changes. Begin with the cheapest: a sentence, a field, a message the evening before. Record each change and its date on this page; the measurement of Chapter 5 will need the dates.

Reading it. A handful of causes usually account for most of the failure demand heard. Report the causes and their owners, not a percentage.



4 · The case trace

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4 · The case trace

From Chapter 2. Used in days twenty-one to forty-five, for ten customers drawn at random from an ordinary month; repeated four weeks later.

Customer (account, not ticket): Matter:

The customer's first sentence, from the first contact:

Done means: the customer did not need to come back about this within weeks (agree the period once, for all ten).

#	DATE	ROUTE	WHO HANDLED IT	WHAT THE CUSTOMER SAID OR ASKED	CHASING OR EXPLAINING AGAIN?	WHAT WOULD THE HANDLER HAVE NEEDED TO FINISH IT HERE?
1						
2						
3						
4						
5						
6						

Totals. Contacts before done: Days from first contact to done: Contacts that were chasing or explaining again:

Systems searched to see this case whole:

Read with: an adviser who handles such contacts every day. Ask what she would have needed, not why the case was closed.

5 · The clean-case count

From Chapter 2. Used once the ten traces are read.

Group the answers from the right-hand column of every trace.

GROUP	COUNT ACROSS THE TEN CASES	EXAMPLE
Information held elsewhere that the handler could not see		
Authority held elsewhere that the handler could not use		
A hand-off to a team with no way back to the customer		
A rule that asked the customer to do something they could not know to do		
Other		

The clean-case count. Of the ten, how many were done in a single contact, by the customer's definition? of 10.

Beside it: the organisation's own first-contact resolution figure for the same month: . The gap between the two is the hidden repeat.

First change at the point of contact. The one piece of information to put in front of the handler: . The authority to give the handler, and its written limit: .

Reading it. The count is a description, not a target. Trace another ten in four weeks; expect the largest group to have moved.

6 · The call to the customer who left: run sheet

From Chapter 3. Used in days thirty-one to sixty, by the sponsor or another senior person, for ten to twenty customers whose pattern has changed.

Before the call (five minutes). Read the customer's history: what they used to buy or use, when it changed, any contact or complaint on record. Decide nothing about why.

The opening (thirty seconds). *I noticed you haven't [ordered / booked / used the service] since [month]. I'm sorry not to have noticed sooner. I'd be grateful to know what went wrong, if anything did.* Then wait.

One question at a time. Ask a second question only to understand the first answer better: *When was that? What happened then? Did you mention it to anyone here?*

Write down what is said, in the customer's words.

WHAT THE CUSTOMER SAID	WHEN IT HAPPENED	HAD THEY TOLD ANYONE HERE? WHO?

The close. Thank them. Say what you will look into and when you will ring back. Make no offer. Santa Anna's book on doing business as a living system describes the question such a call should feel like: "No form. No survey. A genuine, human question."

The second call (within the time you promised). Say what was found and what changed, or why it did not.

Mistakes to watch for. A junior caller with a script. An offer in the first minute. Ringing only the largest accounts. A first call with no second.

Signs it is working. Customers talk for longer than you expected. Two calls in five mention the same cause. A customer you rang rings back.

7 · The counter page and the complaint read as a sample

From Chapter 3. Used from day thirty-one, at one or two places where customers speak to the organisation.

The counter page. Head it with one sentence: *Write down anything a customer says that sounds like "this didn't work for us", in their words.*

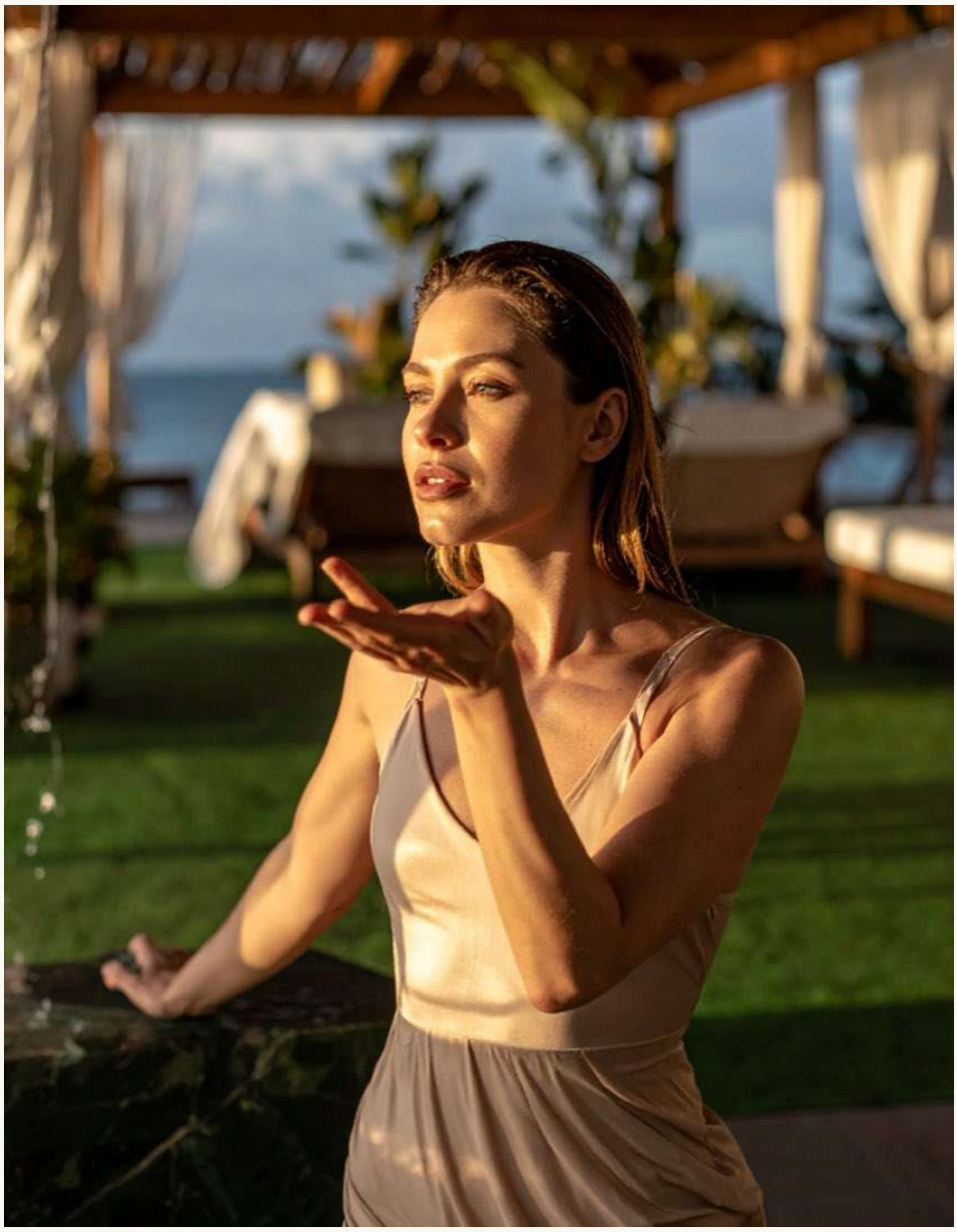
DATE	WHAT THE CUSTOMER SAID	CUSTOMER (IF THEY WISH)	ANSWER	ANSWERED ON

Read every Friday by the person who owns that part of the business. Every line receives one of three answers within a week: *changed, and how*; *not changed, and why*; *passed to (name), on (date)*.

The complaint read as a sample. For every complaint received, ask the records one question and write the answer beside it.

COMPLAINT (DATE, IN A SENTENCE)	WHO ELSE HAS MET THE SAME THING AND NOT SAID SO? (FROM THE RECORDS)	HOW MANY?	WHAT WAS DONE FOR THEM

Reading it. A falling number of lines or complaints is not yet good news; check page 10's balancing measure first.



8 · The recovery card and the follow-up call

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8 · The recovery card and the follow-up call

From Chapter 4. Used from day forty-one, for every recovery, however small.

The authority, written down. What the people who face customers may do without asking, and up to what limit:

The card. Six lines.

Date
What the customer was promised
What happened instead
What was done to put it right
What it cost (money or time)
Why it happened, in your own words

The three things a customer judges (Tax, Brown and Chandrashekaran, 1998). Tick each.

- [ ] The outcome: what they received.
- [ ] The procedure: how fast, how easily, how many times they had to explain.
- [ ] The treatment: believed, spoken to plainly, told *that was our mistake*.

The follow-up call (within two days, by someone other than the person who recovered). *I'm ringing about [what happened] on [date]. Was what we did enough?* Write the answer on the back of the card. Make no offer the customer did not ask for.

9 · The weekly cause review

From Chapter 4. Thirty to forty-five minutes, every week from day forty-one.

Who attends. The convenor, with the week's cards. The owner of every system or rule that produced a card. The sponsor for the first four reviews and every fourth after that.

The order.

1. Group the week's cards by cause (five minutes).
2. Give each group to its owner, with the cards themselves.
3. For each group ask what the rule or system produced, not who made it.
4. Mark each cause as a must-be failure (something customers take for granted) or not. Must-be causes go first.

5. Agree what the owner will bring next week: a change, or a plain reason why the cause will stay and what it will cost to keep.

CAUSE	CARDS THIS WEEK	MUST-BE?	OWNER	CHANGE OR REASON, DUE	CARDS IN THE FOUR WEEKS SINCE

Mistakes to watch for. A hunt for whoever made the rule. Categories replacing the *why* line. The recovery budget cut because it rose. Owners who stop attending.

10 · The measurement conversation for demand

From Chapter 5. The history it reads is copied and dated by day ten (Chapter 6); the conversation is held in days sixty-one to ninety.

Who is in the room. The person responsible for the money. The person responsible for the operation, and the owner of the upstream system. Someone from the front line. Someone who speaks for customers, where possible. Whoever will calculate, and whoever will check.

The questions, in order. Do not skip ahead.

1. What, in plain words, has been changed?
2. Which unit follows the case rather than the channel: contacts per completed case, visits per completed job, days to done?
3. What does the dated history show about that unit over two to three years? Plot it. What does an ordinary month look like, in each season?
4. What could move the unit for reasons nobody here controls (weather, the size of the customer base, a change in law)? For each: which outside record, and how will it be allowed for?
5. Which signal of customers who have stopped asking will sit beside the measure (problems found by staff and never reported, complaints to a regulator or ombudsman, cancellations, lapsed accounts)?
6. Does any part of the measure depend on people labelling contacts? Who will sort a blind sample each month?
7. Are all routes counted together, so that a contact moving from phone to web is not read as a fall?
8. Who will calculate, and who with no stake will check?
9. How, and how often, will the result be shown to the people whose work produced it?
10. If the gain is real, what will change in the organisation's own records (hours not bought, visits not made, backlog cleared)?
11. What happens if a system or rule changes during the period?

The one-page agreement. Fill it in together and sign it before the change is read.

What has been changed, and when
Main unit, and the records it comes from
History used, and the ordinary range it shows
Adjustments, each with its outside record and method
Balancing measure: customers who have stopped asking
Blind sample of labels: who, how many, how often
Routes counted
Who calculates; who checks
How and how often the result is shown, and to whom
What will change in the records if the gain is real
What happens if a system or rule changes
Date agreed
Signed

Reading the monthly figure. Plot each month against the ordinary range of its history for that season. Treat a point as news only when it falls outside the range, or when several in a row move the same way. A fall in the main unit with a rise in the balancing measure is not a gain.

11 · The ninety days on one page

From Chapter 6.

DAYS	PRACTICE	WHO	TIME IT TAKES	WHAT IT PRODUCES	EARLY SIGN IT IS GOING WRONG
1–10	Listen: map the routes and the reports, two front-door sessions, fix a dated copy of the history	Sponsor, convenor	Sponsor about 5 hours a week	A first-guess page: where the organisation stops hearing	People asking what the customer programme is called
11–30	The front door: demand sheets, sorting, tally, ten-call rule (pages 1 to 3)	Sponsor and two or three managers	About 3 hours a session, three sessions a week, two weeks	Causes by owner; first cheap changes	Advisers stop saying things not on the sheet

DAYS	PRACTICE	WHO	TIME IT TAKES	WHAT IT PRODUCES	EARLY SIGN IT IS GOING WRONG
21–45	Following cases home (pages 4 and 5)	Convenor gathers; readers in pairs with an adviser	A morning for the first case, under an hour for the tenth; 30–40 minutes to read each	Clean-case count; groups; first change at the point of contact	Every case reads as an exception
31–60	The ones who leave: calls, counter page, complaints as samples (pages 6 and 7)	Sponsor and senior colleagues	15–20 minutes a call; 10 minutes a week for the page	Causes the front door never heard	Leavers decline to talk; fewer lines each week
41–70	The second half of recovery (pages 8 and 9)	Front line; owners; convenor	30–45 minutes a week	Causes changed upstream	The *why* line grows shorter
61–90	The measurement conversation (page 10)	Finance leads; operations; front line; customer voice; calculator and checker	Two meetings of 90 minutes	A signed page and a first monthly figure	Someone in the room goes quiet

12 · The day-ninety review and the first Monday

From Chapter 6. A meeting of the working group and the sponsor, about two hours.

Bring the first-guess page, the tallies and first changes, both sets of case traces, the notes of the calls and the counter page, the recovery cards and the cause review's record, and the signed measurement page.

Ask, in order:

1. Where was the first guess right, and where was it wrong?
2. Which failures heard at the front door have been removed upstream, and who removed them?
3. How many of the ten cases were clean, and has the second set of ten moved?
4. What did the customers who left say that nobody at the front door had heard?
5. Which causes on the recovery cards have changed, and which owners have not yet answered?
6. Is there a gain both sides believe, and what does it show so far, beside its balancing measure?
7. Which customers, and which members of staff, have started saying things they did not say before?
8. Which practice is not yet real, and what would make it real?

What not to conclude. That customers are better served in a lasting way (ninety days show whether the practices are kept). That one month's fall in contacts is a gain. That an absence of findings means an absence of failures; it usually means one practice is not yet real, and the first place to look is the front door.

The first Monday, for anyone who wants to begin with less.

- Sit beside the people who answer your customers for one hour, and write down the first sentence of every contact in the customer's words. Mark each that begins *I'm ringing again*, or means it.
- Take one customer who contacted you last month, find every contact they made about the same matter by every route, and count the contacts and the days.
- Ring one customer who has stopped buying from you, yourself, with no offer, and ask what went wrong.

What your customers have already said

Much of what arrives at a firm's front door is its own earlier failure, coming back with the customer's account of where it happened.

Luminous Prosperity Inc. takes this work into organisations as a gainshare. The flow is opened from the inside, with the people who already hold what the firm knows. The gain is counted from records the firm already keeps, against a measure both sides sign before anyone knows the answer, and the house is paid as a share of what is found: between thirty and ten per cent of it.

The book teaches the reading. What your own calls, tickets and quiet leavers are saying, and what it would be worth to need fewer of them, is read from your records. That begins with a conversation.

REQUEST A CONVERSATION

References

1. Sources for this chapter: The sources behind these pages are given in full in the notes to Chapters 1 to 5: Seddon (2003, 2008), Ohno (1988) and Jackson, Johnston and Seddon (2008) for pages 1 to 3; Gans, Koole and Mandelbaum (2003), Deming (1986) and Griffin and Hauser (1993) for pages 4 and 5; Hirschman (1970), Best and Andreasen (1977), Singh (1988) and Fornell and Wernerfelt (1987) for pages 6 and 7; Tax, Brown and Chandrashekaran (1998), Smith and Bolton (1998), de Matos, Henrique and Rossi (2007), Michel and Meuter (2008) and Kano and colleagues (1984) for pages 8 and 9; Campbell (1979) and Anderson, Fornell and Mazvancheryl (2004) for page 10; Santa Anna, A. *Luminous Entrepreneurship: Doing Business In and As Living Systems*, Chapter 8, "The Customer Co-Creation Toolkit" ("The Open Invitation"). The Luminous Library; The times given are planning guides from practice, not findings of a study.

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