

# FD - P13. Voice Of Customer process

- Version Control
- 1. Functional Process
  - Process Overview
  - Use cases
    - Store VOC record
      - VOC surveys managed by 3rd party
      - 2. VOC surveys managed by Solvay (Qualtrics)
    - Manage VOC customer action plan
      - Create a VOC action
      - Review VOC customer action plan
- 2. Data Model & security
  - Main objects
  - VOC record Security Model
  - VOC action Security Model

## Version Control

Version	Date	Description	Author
v.1	04.06.2018	Creation	Sophie Millet

## 1. Functional Process

### Process Overview

Voice of The Customer process aims to collect, store and improve Solvay Net Promoter Score (NPS).

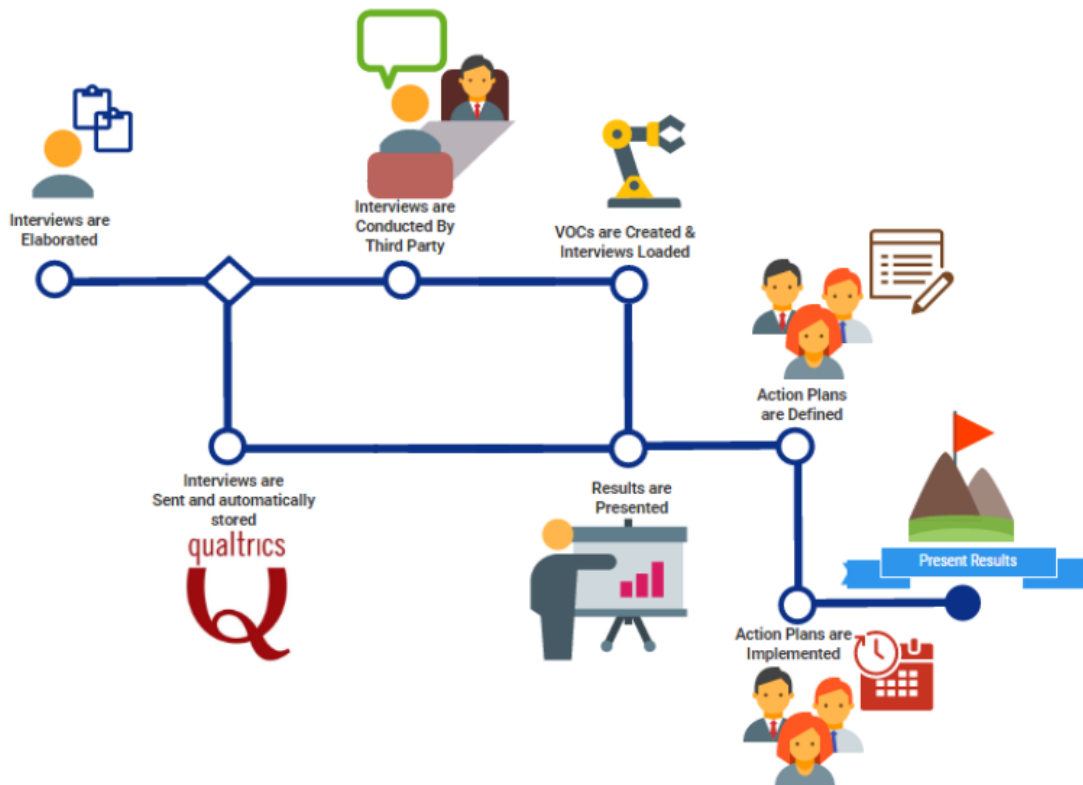
GBUs have to conduct Customers interviews, where, among other key questions, will gather the Customer feedback.

After Interviews results analysis, GBUs have to develop an Action Plan to improve the overall results. We might say this process has two main steps:

- Management of the Customer Interviews
- Internal Action Plan Definition.

Since the Interviews can also collect more key information then the NPS, according to each GBU needs and scores to be identified, the Interviews management can be delegated to a Third Party Company, or GBUs can manage them Internally.

- Surveys are elaborated & built (Outside of [salesforce.com](https://www.salesforce.com) solution (External Providers, Qualtrics))
- Interview results are collected and stored



## Use cases

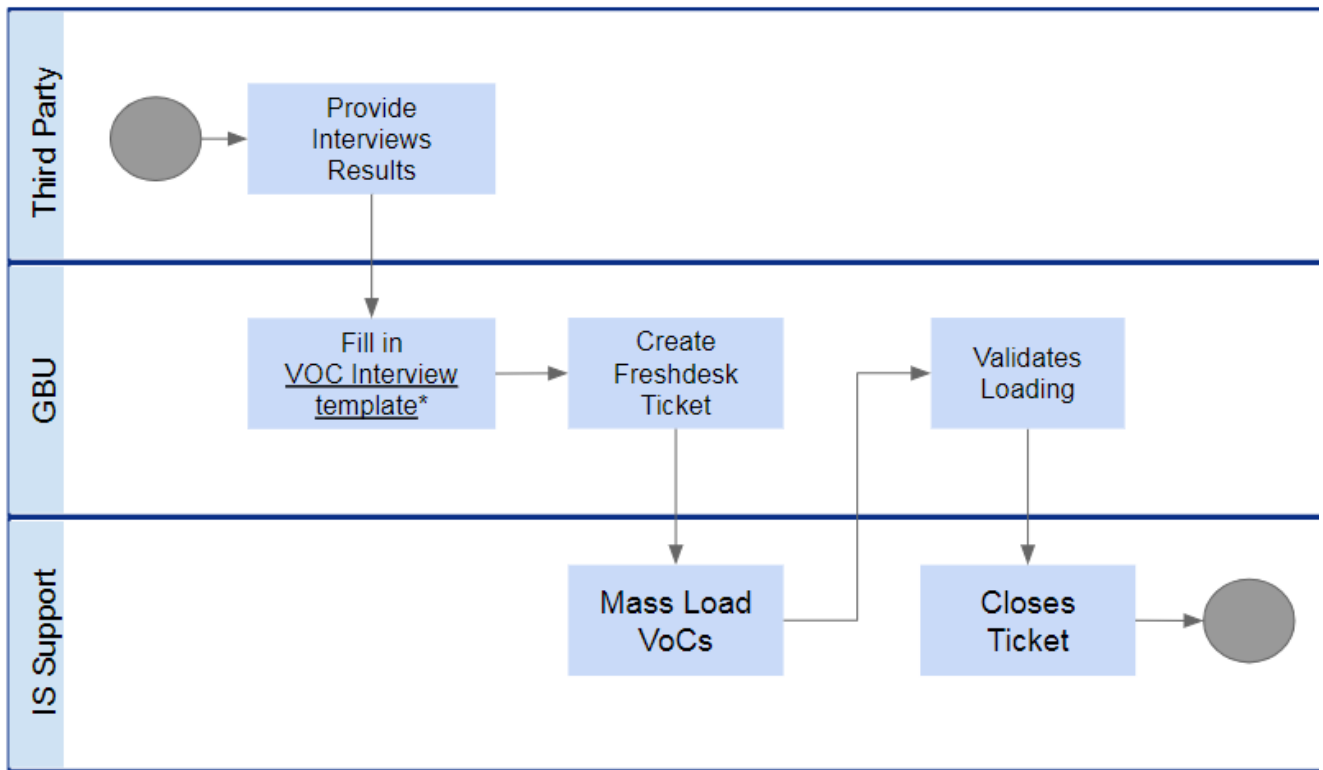
Interview results (VOC records) are collected outside of the CRM solution, then they are integrated or uploaded in Salesforce.com as "VOC" records.

## Store VOC record

### 1. VOC surveys managed by 3rd party

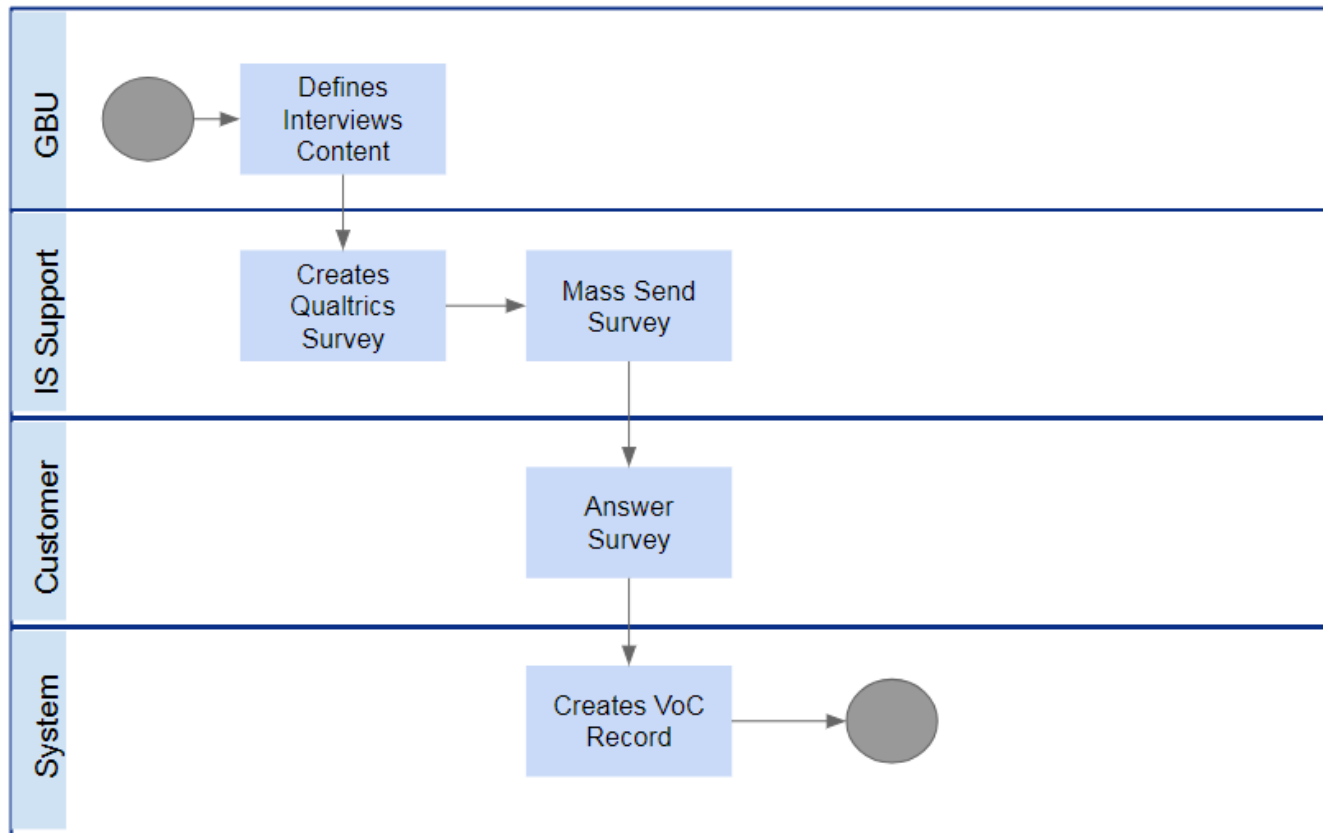
- Third Party manages and conducts the Interviews.
- Need to Load VOCs manually.
- Need link InterviManagedews and CORE CRM.
- IS will support on the VOCs Loading and link with Interview

**Interviews Documents should be loaded to a folder in Gdrive and shared with \$SBS-IS-Appli-OTC-CRM All**



## 2. VOC surveys managed by Solvay (Qualtrics)

- Solvay manages Interviews with IS support for Survey link with CORE CRM.
- Respondent answers automatically stored in CORE CRM.
- VOCs automatic created when respondent answers.
- Full Interviews are automatically linked in CORE CRM.



## Manage VOC customer action plan

When VOC records of a survey have been registered in the system, VOC actions (a SFDC task with the record type "VOC Action") may be created to improve the customer relationship and increase the NPS score.

A VOC Customer Action Plan is the list of all VOC actions related to an account.

VOC actions may also be linked to an existing account plan.

### Create a VOC action

- From the VOC record related to a customer (or a contact), create a VOC action and assign it to a user
- Set up a start and end date
- Optionally, link the VOC action to an account plan

### Review VOC customer action plan

- From the account, open the VOC customer action plan

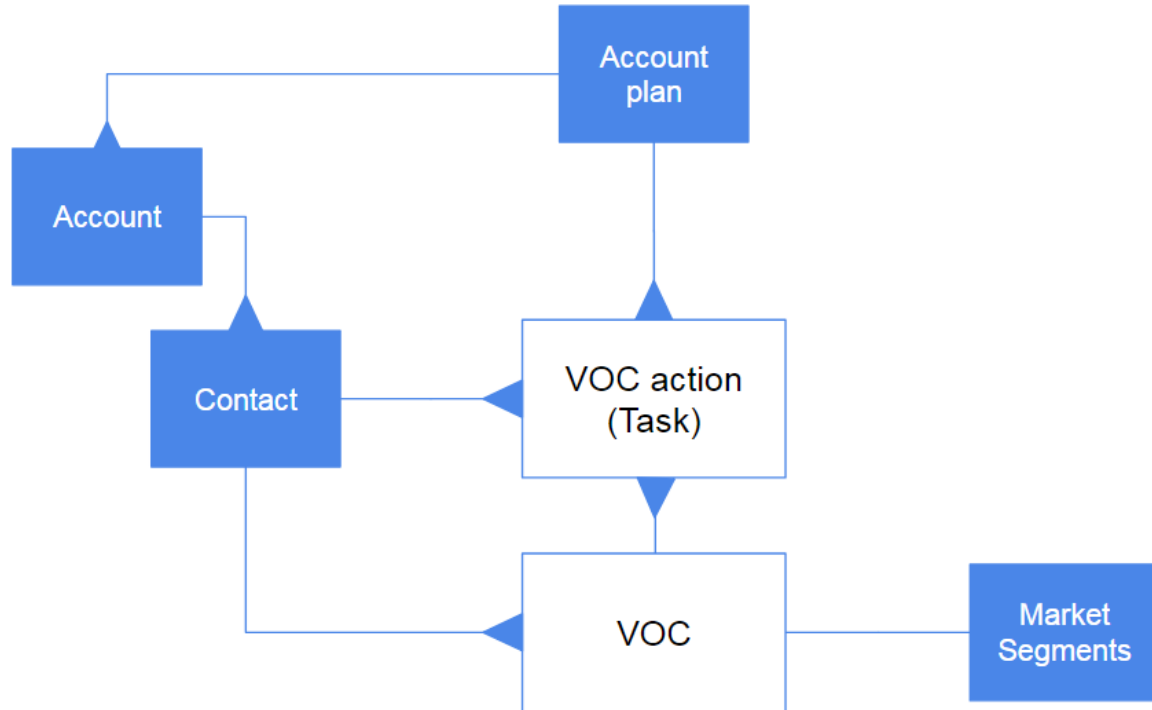
Voice of the Customer							Return to Account															
#	VOC NUMBER	GBU	PERSON	MAJOR ACTION ITEMS	START DATE	END DATE	ACTION ITEM PLAN															
							2018				2019				2020							
							PY	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4			
1	VOC# 0000023	Peroxides	Jason Muessig	▼ Gordy Visit	14/08/2017	14/08/2017																
2	VOC# 0000023	Peroxides	Jason Muessig	▼ Evaluate VMI Options	07/07/2017	31/08/2017																
3	VOC# 0000023	Peroxides	Jason Muessig	▼ Review Georgetown VMI	17/08/2017	30/09/2017																
							ACTION ITEM STATUS															
							ON SCHEDULE				DELAYED				COMPLETE				CANCELLED			
							Return to Account															

## 2. Data Model & security

## Main objects

1. **Account**: Standard Salesforce Object to manage the information about the Customer
2. **Contact**: Standard Salesforce Object to manage the contact person from the Customer
3. **VOC**: Custom Salesforce Object to store quantitative customer feedback
4. **VOC action** : Standard Salesforce object (task record type) to manage actions to improve NPS score

## VOC data model



## VOC record Security Model

<b>Who can create?</b>	A VOC record can be created only by integration, a GBU data steward or a system admin
<b>Who can see?</b>	Visibility of VOC records depends on the record itself (Visibility field). A VOC record can be Shared, GBU restricted or Confidential.
<b>Who can update?</b>	A VOC record can be created only by integration, a GBU data steward or a system admin
<b>Who can delete?</b>	A VOC record cannot be deleted. Only the System Administrator (SBS) can delete a VOC record.

## VOC action Security Model

<b>Who can create?</b>	Any user accessing a VOC record can create a new VOC action
<b>Who can see?</b>	Any user accessing a VOC record can see a VOC action
<b>Who can update?</b>	Any user accessing a VOC record can update a VOC action
<b>Who can delete?</b>	A VOC action cannot be deleted. Only the System Administrator (SBS) can delete a VOC action

