Record insights from listening to calls

Learn more about your users by listening to service calls and recording your insights.

## How to use this template

You can use this template to:

* pick a service area that has a manageable volume of calls and is specific enough to learn about. For example, within housing, you might look at repairs
* ensure the exercise is a quick and accessible way to learn a bit more about your users
* listen to some calls with an open mind, at this stage there's no need to think of any solutions or what you think the problems are
* record any notes about the people calling and their experiences in [the board](#_zb0ggjy7fm70) below

### Tips

You should:

* keep notes anonymous – do not record personal details
* record facts, not your opinions
* work together with call handlers – t’s about improving digital services, not monitoring performance
* focus on the experience of callers
* check callers are informed they may be monitored
* check your plans with someone responsible for data protection
* keep it concise – you do not need to capture everything

## Before you start

Think about who you can speak to internally. This could be:

* a contact centre manager to set up call listening. Make sure they understand the benefits of you learning about users and how you'll use the insights constructively
* decision makers involved in change. You can share your findings and agree on any next steps

Make sure they understand what you want to do.

### Define your research goals

These goals can guide your research and ensure you gain valuable user experience information to share with decision makers or to improve your digital services. Write questions you hope to answer.

#### Goal 1

For example, why are people calling and using online services?

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#### Goal 2

For example, what do people really need to get done?

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#### Goal 3

For example, how are problems surfacing for users?

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## During the calls

Note things that help you understand more about service users and where you could improve the service.

### Call notes

| **Call** | **The user** | **Their goals** | **What went wrong** | **What went well** | **How they’re feeling** | **The impact** |
| --- | --- | --- | --- | --- | --- | --- |
| **1** |  |  |  |  |  |  |
| **2** |  |  |  |  |  |  |
| **3** |  |  |  |  |  |  |
| **4** |  |  |  |  |  |  |
| **5** |  |  |  |  |  |  |
| **6** |  |  |  |  |  |  |
| **7** |  |  |  |  |  |  |
| **8** |  |  |  |  |  |  |
| **9** |  |  |  |  |  |  |
| **10** |  |  |  |  |  |  |

### Quotes

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### General notes

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## Additional stats

Add any data or statistics that add context to your findings.

For example:

* portion of all calls this service gets
* average call duration
* Customer Relationship Management (CRM) data about call outcomes
* satisfaction metrics

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