



# THE VOICE OF THE CUSTOMER KNOW THE NEEDS OF FINANCE

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*The voice of the customer guides world-class leaders' every action and decision.*

– Yu Sang Chang

To help streamline operations, reduce friction, and enhance satisfaction and quality, finance teams must understand the *"voice of the customer"* (VOC).

Below is a high-level guide for finance teams to identify their customers, understand their needs, and drive continuous improvement in satisfaction:

1

**Customer Identification:** Through questioning and surveys, clearly understand the internal and external customers who rely on the finance team's outputs. Group and categorize customers based on shared requirements and similarities.

2

**Collect Customer Needs:** Establish a systematic approach to collecting customer needs that is shared easily and enables meaningful conclusions to drive action.

When designing this system, consider the following:

**Gather needs objectively and consistently:** set emotions aside and focus on facts, view each interaction with customers as an opportunity for a fresh start

**Collect needs at the right level:** Consider the types of work and analysis required, the questions the customer aims to answer, and the timing of decision-making. If needs are collected too high, the message may be lost; too low, and the information may be meaningless without additional work cycles to aggregate.

**Make it easy for the customer:** Set up regular check-ins with customers to gather feedback on current processes, and encourage emails for feedback. Ensure customers know the finance team is always approachable with feedback.

3

**Internal Process Review:** through regular cycles of customer identification and gathering of customer needs, review current processes to ensure the finance team is focused on delivering the right product to the right customer at the right time.

By identifying customers, gathering their needs, and aligning processes, the finance team can effectively incorporate the VOC into daily operations, enhancing satisfaction.



Ready for improved finance?



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