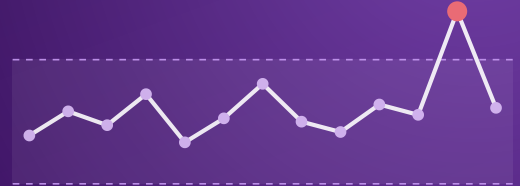




StatQuestions



FREE PLAYBOOK • 2026 EDITION

Build a CX strategy that holds up.

How to classify your customer issues, turn them into a strategy with real choices, and keep it human-led with AI doing the heavy lifting.

What a strategy is and is not

9-step strategy method

Human-led, AI-fueled CX

Taxonomy build guide

Worksheets

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How to use this playbook. Part 1 shows how to build a CX strategy that makes real choices and proves results. Part 2 is the hands-on method for classifying customer issues, which every number in Part 1 depends on. Do the work in the companion Excel file, the CX Taxonomy Workbook: every step names its tab.

PART 01

Your CX strategy

What a strategy is and is not, how to build one step by step, and how to keep it human-led with AI behind it.

How the playbook and the workbook fit together

This playbook explains the method. The companion Excel file, the **CX Taxonomy Workbook**, is where you do the work. Every step below points to the tab that goes with it, and every tab points back here. The worked examples match in both, so you can check your understanding against real numbers.

What you are doing	Where it is explained	Workbook tab
Deciding what a strategy is	Part 1: What a CX strategy is	
Scoring where your team is today	Part 2: Why a taxonomy matters	Why It Matters
Building and testing your list of themes	Part 2: Build yours in six steps	Starter Taxonomy, Tag Your Cases, Agreement Check
Seeing which themes are big	Part 2: Keeping it healthy	Theme Summary
Telling a real change from normal wobble	Part 1: Step 4	Normal Range
Putting a price on each theme	Part 1: Step 5	Cost Per Theme
Choosing what to fix first	Part 1: Step 6	Fix-First Score
Checking a sample is big enough	Part 1: Step 7	Normal Range (bottom)
Writing the strategy down	Part 1: Your one-page CX strategy	One-Page Strategy
Recording every change	Part 2: Keeping it healthy	Change Log

What a CX strategy is, and what it is not

Most companies have a CX strategy on a slide. Far fewer have one that changes what gets fixed. The difference is simple: a real strategy is a small set of choices, backed by evidence, with an owner and a way to tell whether it worked.

A CX strategy is	It is not
A few clear choices about which customer problems you will fix first, and which you will live with for now	A list of every idea anyone has had, all marked "priority"
Built on what customers actually contact you about, counted the same way every week	Built on the loudest complaint, the latest escalation, or a hunch
Tied to money: what each problem costs and what fixing it is worth	A goal like "delight our customers" with no number behind it
Owned: every problem has a team that owns the fix at its source	"CX owns the customer experience" while the causes sit in shipping, product and billing
Judged against a normal range, so you know when something truly changed	A score that moves every week while nobody knows why
Reviewed on a set schedule and changed when the evidence changes	A deck written once a year and filed away
Clear about what you will not do this quarter	A plan that says yes to everything

Tactics are not strategy. A new help desk, a chatbot, an NPS target, a survey program or a training course can all be useful. Each one is a tool you pick after the strategy says which problems matter most. If you start with the tool, you end up measuring the tool.

The quick test. Read your current CX strategy and ask: does it tell someone what not to work on this quarter? If it does not, it is a wish list.

How to build a CX strategy that holds up

The method below is the one StatQuestions is built on. It works with a spreadsheet and a patient team, and it scales when you automate it. Each step feeds the next, so the order matters.

Step 1. Start from one or two business goals

Pick the company goals CX should move. Keep it to two. Good examples: keep more dealers and repeat buyers, lower the cost to serve each order, protect margin by cutting returns and credits. Every later choice gets judged against these.

Step 2. Listen everywhere, in one list

Pull every channel into one place: email, calls, chat, surveys, reviews, returns notes. A problem that shows up in three channels is one problem, and you will only see its true size if all three are counted together.

Step 3. Classify every contact on one taxonomy

This is Part 2 of this playbook. Without a shared list of issues, with clear definitions, every number that follows is an opinion. Check that two people tag the same cases the same way before you trust the counts.

Workbook: Starter Taxonomy, Tag Your Cases, Agreement Check.

Step 4. Turn counts into rates, and find the normal range

Counts rise when business is busy. Rates do not lie that way. Divide each theme by orders, shipments or customers in the same week, for example damaged deliveries per 1,000 orders.

Every rate moves a little week to week on its own. The normal range tells you how much. For a rate, it is the average plus or minus three times the typical wobble:

$$\begin{aligned}\text{Upper limit} &= \text{average} + 3 \times \sqrt{(\text{average} \times (1 - \text{average}) \div \text{orders})} \\ \text{Lower limit} &= \text{average} - 3 \times \sqrt{(\text{average} \times (1 - \text{average}) \div \text{orders})}\end{aligned}$$

Here is the example that is loaded in the workbook:

What you know	Example
Average rate over 13 weeks	8% of orders lead to a contact about this theme

What you know	Example
Orders per week	2,000
Normal range	about 6.2% to 9.8%
What it means	A week at 9.5% is ordinary wobble. Week 12, at 11.2%, is outside the range: a real change worth chasing.

This one habit stops most wasted effort in CX. Teams stop reacting to noise, and when something does break out of its range, people believe it. Use at least 8 weeks of history, and treat 8 weeks in a row on one side of the average as a real change too.

Workbook: Normal Range. Type your weekly counts and orders; it draws the limits and labels each week.

Step 5. Put a price on each theme

A theme becomes a budget line when you can say what it costs. Add up four things for a month:

Cost	Example: "Damaged in transit"
Handling: contacts times cost per contact	700 contacts × \$6 = \$4,200
Repeat contacts: customers who had to come back	210 × \$6 = \$1,260
Money given back: replacements, credits, refunds	250 × \$40 = \$10,000
Rework: staff time spent fixing it behind the scenes	10 hours × \$29 = \$290
Total	\$15,750 a month, about \$189,000 a year

Use your own numbers. Rough but honest beats precise but missing. To find cost per contact, divide the fully loaded cost of an agent hour by the contacts one agent handles in an hour.

Workbook: Cost Per Theme. The example above is row 7.

Step 6. Choose the few, and write down what you will not do

Rank your top ten themes with the fix-first score: volume × severity × repeat contact × fixability, each scored 1 to 5 (the scoring guide is in Part 2, From tags to action). Pick two or three for the quarter. Write the rest down as "not this quarter." That list is what makes it a strategy.

Workbook: Fix-First Score. The example, Damaged in transit, scores 192.

Step 7. Prove the cause before you fund the fix

Read the customers' own words in the top themes and ask why until you reach something a team can change. Then test the idea. If you think one carrier causes most damage, compare that carrier's damage rate with the others. A gap of a point or two on a few hundred orders is often chance. Check the sample is big enough before anyone rebuilds a process around it.

How many cases you have	How far off a percentage can be (95% confidence)
100	about 10 points either way
384	about 5 points either way
1,000	about 3 points either way

Workbook: the bottom of the Normal Range tab works this out for any sample size.

Step 8. Set the success line before the fix ships

Agree in writing what "worked" means before anything changes, for example: the rate falls below its old lower limit and stays there for 8 weeks. Deciding this afterward is how every fix gets declared a success. Keep adding weeks on the Normal Range tab to watch it.

Step 9. Review monthly, reset quarterly

Once a month, look at the chosen themes against their normal ranges and ask whether each fix is on track. Once a quarter, rerun the cost and ranking, retire what is fixed, choose the next few, and log any taxonomy changes in the Change Log.

Your one-page CX strategy

Fill this in and keep it to one page. If it grows past one page, you have not made the choices yet.

Workbook: One-Page Strategy has the same template, with a note on which tab feeds each line.

Part	Our answer
The one or two business goals CX will move	
Where we listen (channels in the one list)	
Our top three themes this quarter, with yearly cost	1. 2. 3.
Owner of each fix (team and person)	
Likely cause of each, and how we will test it	
Success line for each (written before we start)	
What we are not doing this quarter	
Monthly review date and quarterly reset date	

Human-led CX, with AI behind it

AI can now read every email and call a company receives, which no team of people could ever do. That changes what is possible. It does not change who should be in charge. The strongest CX programs are led by people and fueled by AI: people decide what matters and what to do about it, and AI does the reading, sorting and counting at a scale people cannot.

Who does what

People own	AI does
The taxonomy: what each theme means and where the lines are	Reads every email, call and survey and tags it against your taxonomy
Which problems to fix, and what the company will not work on	Counts, trends and prices every theme, every day
Conversations with upset, at-risk or high-value customers	Flags the contacts that look urgent or likely to escalate
Final judgment on unclear or unusual cases	Sends low-confidence cases to a person instead of guessing
Decisions about changes to products, policies and processes	Shows when a theme moves outside its normal range
The relationship with the customer	Drafts summaries and pulls the customers' own words as evidence

Seven guardrails for using AI in CX

1. **Your taxonomy, not the tool's.** Write your themes first, then have the AI classify against them. A tool that invents its own categories gives you a new list every month and no trend you can trust.
2. **Check the AI the same way you check people.** Run the Agreement Check with the AI as one of the two taggers on 50 cases. Aim for 80% agreement on Level 1 before you rely on its counts.
3. **Low confidence goes to a person.** The AI should say when it is unsure, and those cases should be read by someone who knows your business.
4. **Every number opens to the customer's words.** If a chart cannot be traced back to real emails and calls, nobody should act on it.
5. **AI suggests, people decide.** It can point to a likely cause. A person confirms it and chooses the fix.

6. **Watch for drift.** Recheck agreement every quarter and whenever the model or your products change.
7. **Protect customer data.** Remove card numbers and personal details before analysis, and keep only what you need.

The customer test. AI should make it faster for a customer to reach a person who can help, never harder. If your automation keeps customers away from people, it is saving money today and costing you customers later.

PART 02

Classify your CX issues

Build a taxonomy your whole team uses the same way, then turn tags into fixes. Do the work in the companion CX Taxonomy Workbook.

Why a taxonomy matters

A taxonomy is the agreed list of what customers contact you about, with a clear definition for each item, so every person and every tool files the same issue in the same place. It is the foundation under every CX number you report. If two agents tag the same complaint differently, every chart built on those tags is wrong, and no dashboard can fix that later.

It turns "customers are unhappy" into "damaged-in-transit cases on one product line doubled this month, and logistics owns the fix." The second sentence gets budget and action. The first one does not.

The value it drives in your CX strategy

What the taxonomy lets you do	Why it matters to strategy	Without it
Count the same problem the same way everywhere	Email, phone, chat, surveys and reviews roll up into one view, so the true size of a problem is visible	Each channel reports its own top issues and nobody can name the company's biggest problem
Rank what to fix first	Volume, severity and cost per theme give a fix-first list you can defend	The loudest complaint or the latest executive email sets priorities
Give every issue an owner	Each theme maps to the team that can fix the cause, so CX stops absorbing everyone else's problems	Findings stall because no team owns "customer complaints"
Show whether a fix worked	Stable categories let you compare before and after	Nobody can prove the carrier change or the new manual made a difference
Connect customer issues to money	Handle time, repeat contacts, refunds and rework can be priced per theme	CX is seen as a cost center with soft metrics
Spot problems early	A theme rising above its normal range is a signal weeks before returns, reviews or churn	Problems surface when a big customer escalates
Measure your own service	Tagging what your team did shows missed promises and transfers, which drive repeat contacts and are fully in CX's control	Service failures hide inside product and delivery complaints

What the taxonomy lets you do	Why it matters to strategy	Without it
Make automation and AI trustworthy	Clear definitions and examples are what rules and AI classifiers learn from	An AI tool invents categories that change month to month
Speak one language across the company	Product, operations and leadership read the same theme names in every report	Every department has its own spreadsheet and its own truth

Where it sits in the CX cycle

1. **Listen:** collect feedback from every channel.
2. **Classify:** tag each case with the taxonomy. This playbook.
3. **Measure:** count, trend and price each theme, and check which changes are real.
4. **Find the cause:** read the customers' own words and ask why until a fixable cause appears.
5. **Act:** hand the finding to the owning team with the evidence attached.
6. **Check:** watch the theme after the fix. Keep the gain or try again.

Every later step depends on step 2. Part 1's nine-step method expands this cycle: listening is Step 2, classifying is Step 3, measuring is Steps 4 and 5, finding the cause is Step 7, and acting and checking are Steps 8 and 9. The workbook's **Why It Matters** tab has an eight-question self-score so you can see where your team is today and rescore in 90 days.

What a good taxonomy looks like

Use three levels for the issue itself, and a few separate fields for everything else about the case. Keeping those apart is what stops the list from growing into hundreds of overlapping themes.

Level	What it answers	How many	Example
Level 1: Area	Which part of the experience?	6 to 10	Delivery & Shipping
Level 2: Issue	What went wrong?	Up to 8 per area	Damaged in transit
Level 3: Cause	Why, specifically?	Grows from your data	Crushed at the corner, freight carrier

Fields beside the theme, never inside it:

- **Channel:** email, phone, chat, survey, review. A delivery problem is the same problem by phone or email.
- **Product or brand:** keep it separate so one theme works across your whole catalog.
- **What the customer wanted:** a fix, a replacement, a refund, information, to be heard.
- **What our team did:** resolved first time, promised and kept, promised and missed, wrong information, transferred. This is the field most teams skip and most need.
- **Severity:** 1 low to 4 critical. Safety is always 4.
- **Repeat contact:** yes or no.

Six rules a good taxonomy follows:

1. **Named from the customer's side.** "Late delivery," not "Logistics team." Customers do not know your org chart.
2. **What happened, not how they felt.** "Refund not received," not "Angry customer." Feelings are real, but no team can fix "angry."
3. **One home for every case.** Each theme has a do-not-include line that says where the neighboring case goes instead.
4. **Other stays small.** Under 5 percent. If Other grows, a theme is missing.
5. **No theme too big.** If one Level 2 holds more than a quarter of all cases, it is really several problems.
6. **Changes are written down.** Every rename, split or merge goes in the Change Log with a date, so trends stay honest.

Build yours in six steps

About two to three weeks of part-time work for one CX lead and two agents. Tick each step off as you go.

Step	What you do	Workbook tab	Time	Done when
1. Pull a sample	Export 200 to 300 recent cases across every channel, from the last 60 to 90 days	Tag Your Cases	1 hour	Cases pasted, one per row
2. Start from the starter list	Read the 38 starter themes. Delete what you never see, rename what does not fit, add what is missing	Starter Taxonomy	2 hours	Every theme has a definition and an example
3. Tag the sample	Tag every case. Anything that fits nowhere goes to Other with a note	Tag Your Cases	4 to 6 hours	Health checks show no untagged cases
4. Fix the gaps	Read every Other case and every theme over 25 percent. Add, split or reword themes	Theme Summary	2 hours	Other under 5 percent, no theme over 25 percent
5. Test agreement	Two people tag the same 50 cases without talking	Agreement Check	2 hours each	Level 1 agreement 80 percent or better
6. Lock version 1	Record it in the Change Log, share it with every team, and set a monthly review	Change Log	1 hour	Everyone tags from the same list

Checklist

- ☐ Sample pulled from every channel
- ☐ Starter themes trimmed and renamed
- ☐ Sample fully tagged
- ☐ Other under 5 percent
- ☐ No Level 2 theme over 25 percent
- ☐ Agreement Check at 80 percent or better
- ☐ Every theme has an owning team
- ☐ Version 1 logged and shared
- ☐ Monthly review on the calendar

Writing definitions people agree on

Most disagreement between taggers comes from two neighboring themes with no line between them. Every definition needs five parts, and the most important is the last-but-one: where the neighboring case goes instead.

Part	What to write	Example: Damaged in transit
Name	Short, from the customer's side	Damaged in transit
Definition	One sentence on what it is	The item arrived damaged.
Include when	The test a tagger applies	Damage was seen at delivery or unboxing, before use
Do not include (use instead)	The nearest neighbor and where it goes	It broke after use: Product > Defect or failure
Example sentence	A real customer line, lightly edited	"The pan arrived with a crack right through the corner."

Tie-break rules for cases with more than one problem. Agree them once and print them next to the list.

1. Tag the problem the customer most wants fixed. Put the other in Second issue.
2. Safety always wins, whatever else is in the case.
3. A service failure on top of a product problem (a missed callback about a damaged tub) is tagged by the product problem, with the service failure recorded in "What our team did."
4. Praise inside a complaint: tag the complaint, note the praise.

When the Agreement Check comes back low, look at the areas with the lowest agreement on the right of that tab. For each pair of themes people confused, rewrite the do-not-include line on both and add one more example sentence. Then retest with a fresh 50 cases.

Worksheet: your first draft

Fill this in with your team before you open the workbook. Type straight into the cells. The first row shows the format.

Our scope

Question	Our answer
Which channels will we tag?	Email, phone, ...
Which date range is our sample from?	
How many cases in the sample?	
Who tags? (at least two people)	
Who owns the taxonomy and signs off changes?	
When is our monthly review?	

Our Level 1 areas and owners

Level 1 area	What belongs here	Team that owns the fix	Rough share of cases today (guess)
Delivery & Shipping	Anything between our dock and the customer's door	Logistics	25%

Our five biggest issues right now (before tagging)

Write down what the team believes today. After tagging, compare. The gap between belief and data is usually the most useful finding of the whole exercise.

Rank	What we think it is	What the data showed
1		
2		
3		
4		
5		

From tags to action

A taxonomy only pays off when it changes what gets fixed. Two tools make that happen.

1. Fix-first score

Score each of your top ten Level 2 themes from 1 to 5 on four things, then multiply. The highest scores go first. The workbook's **Fix-First Score** tab does the math and ranks them.

Factor	1	5
Volume	Under 1% of cases	Over 10% of cases
Severity	Mostly low	High or critical common
Repeat contact	Rarely comes back	Often comes back
Fixability	No clear owner or cause	One team, a known cause

Fix-first score = Volume × Severity × Repeat × Fixability

Theme	Volume	Severity	Repeat	Fixability	Score	Owner
Damaged in transit	4	3	4	4	192	Logistics

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2. The one-page finding

When you hand a theme to the team that owns it, use the same five parts every time. It keeps the meeting on the fix instead of on whether the numbers are right.

Part	What to write
The theme	Level 1 > Level 2, with the definition
How big	Cases in the period, share of all cases, change from last period

Part	What to write
Is the change real	Compared with its normal week-to-week range, is it outside it? (Normal Range tab)
In the customers' words	Three short quotes that show the problem clearly
The ask	The likely cause, the owning team, and what we want them to do by when

Then tag the theme in your next review as "fix in progress" and watch it for six to eight weeks. If it drops and stays down, write it up. That before-and-after is the proof that CX drives results.

Keeping it healthy

A taxonomy drifts within months if nobody looks after it: new products, new policies, and taggers inventing their own shortcuts. Thirty minutes a month keeps it sound.

Monthly review (30 minutes, taxonomy owner plus one tagger)

- ☐ Other is under 5 percent. Read every Other case; do three or more share a pattern? Add a theme.
- ☐ No Level 2 holds more than 25 percent. If one does, split it.
- ☐ Themes with zero cases for three months: merge or retire.
- ☐ Spot-check 20 tagged cases. Would you have tagged them the same way?
- ☐ New product, policy or channel this month? Check the list covers it.
- ☐ Every change is in the Change Log.

Quarterly (one hour)

- ☐ Rerun the Agreement Check with a fresh 50 cases and any new taggers.
- ☐ Rescore the eight readiness statements on the Why It Matters tab.
- ☐ Review owners with each team lead. Do they still accept the themes they own?

Change rules

Change	Allowed when	What to do about history
Add a theme	Three or more cases a month fit nowhere else	Nothing; it starts from today
Rename	The meaning stays the same	Nothing; note it in the log
Split one into two	One theme is too broad	Note the date; compare trends only from that date, or retag a sample
Merge two into one	People cannot tell them apart	Add the two old counts together for history
Retire	No cases for three months	Keep it in the log; do not reuse the name

The rule behind all of these: never change the meaning of a theme silently. A trend line is only honest if the category under it meant the same thing the whole time.

Common mistakes and how to spot them

Mistake	How you spot it	The fix
Too many themes at the start	Taggers take over a minute per case, or scroll past most of the list	Cut to 6 to 10 areas and 8 issues each; let Level 3 carry the detail
Themes named after internal teams	Theme names a customer would not recognize	Rename from the customer's side
Feelings as themes	"Frustrated" or "Angry" in the list	Tag what happened; track sentiment separately if you need it
A giant catch-all theme	One Level 2 over 25 percent	Read 30 of its cases and split by cause
Other keeps growing	Other in the top three themes	Read every Other case monthly and add themes
Channel inside the theme	"Phone complaint about delivery" as a theme	Keep channel as its own field
Only tagging the customer's side	No way to count missed promises or transfers	Add the "What our team did" field
Silent changes	Numbers jump the month someone reworded a theme	Log every change and follow the change rules
Letting an AI tool invent the list	Categories shift month to month and nobody can explain them	Write the taxonomy first, then have the tool classify against it and check it with the Agreement Check

Plain-language glossary

Term	What it means
Taxonomy	Your agreed list of reasons customers contact you, each with a written definition.
Theme	One reason in the taxonomy, such as "Damaged in transit" or "Refund not received."
Level 1, 2, 3	Area, issue and specific cause. Level 1 is broad, Level 3 is the detail.
Rate	A count divided by how much business happened, such as contacts per 1,000 orders. Rates let you compare a busy week with a quiet one.
Normal range	The band a rate moves inside when nothing has changed: the average plus or minus three times the typical wobble.
Signal	A change too large to be ordinary wobble: a week outside the normal range, or 8 weeks in a row on one side of the average.
Noise	Normal week-to-week movement. Reacting to it wastes effort.
Margin of error	How far a percentage from a sample could be from the true number. About 5 points either way with 384 cases.
Agreement check	Two people tag the same cases without talking. 80% agreement at Level 1 means the definitions are clear enough to use.
Agreement beyond chance	The agreement score with lucky matches removed (also called Cohen's kappa). Above 0.8 is strong, below 0.6 needs work.
Cost of a theme	Handling plus repeat contacts plus money given back plus rework, usually shown per year.
Fix-first score	Volume × severity × repeat contact × fixability, each scored 1 to 5. The highest scores go first.
Root cause	The upstream reason a theme exists. It is proven when fixing it moves the rate below its old normal range.
Success line	What "worked" means for a fix, written down before the fix ships.

See your own themes on your own data

Tagging a few hundred cases by hand is the best way to learn your own issues. Doing it every week across every email and call is not a good use of your team.

StatQuestions is a customer feedback analytics suite built on exactly this method. It classifies every email, call and survey on one tested scale, lets you drill from any theme down to the customer's own words, and tells you whether a trend is real before you act on it. Bring the taxonomy you built here and we will use it; we set up the ingestion with you, from whatever system holds your feedback.

Book a 30-minute demo

StatQuestions · Customer feedback analytics suite · statquestions.com
An EvalTour product. Free to use and share inside your company.