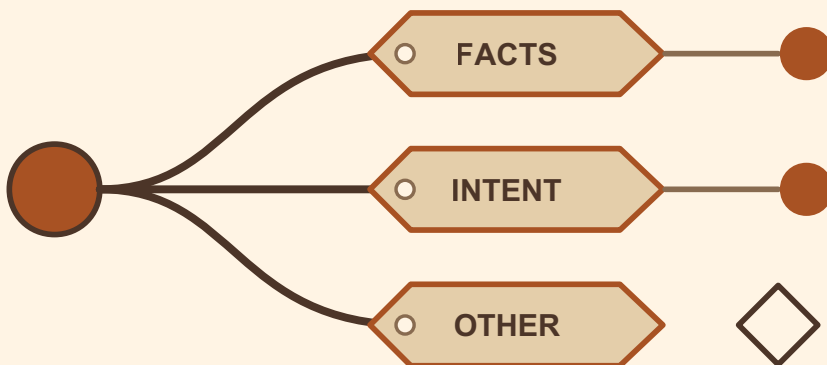




Design and Test a Customer Feedback Taxonomy

Write boundaries that reviewers can apply, then inspect errors and unknowns



Sanjaay Gowda T S

FREE SAMPLE / INTRODUCTION + CHAPTER 1 / EDITION 1.0.0

sanjaaygowdats.ai

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Sanjaay Gowda T S

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Run examples in a separate working folder using the supplied synthetic data. Review inputs and calculations before adapting the techniques to real operations. Model software, service access, subscriptions, ongoing updates and consulting are not included.

Author website: sanjaaygowdats.ai

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This free sample contains the introduction and Chapter 1 only. The closing link opens the complete guide. The companion project and worked solutions are supplied with the complete ebook.

Start here

A feedback taxonomy is a set of distinctions that people or systems apply to observations. Its value comes from consistency and usefulness, not from the length of the label list. If two reviewers read the same record and reasonably choose different labels, the disagreement is evidence about a boundary that needs attention. Hiding that disagreement behind an overall accuracy score makes the taxonomy harder to improve.

This book creates a small single-label taxonomy for Fern Desk, a fictional customer support operation. All records, organizations, IDs, quantities and decisions are synthetic teaching examples. Six reviewed records cover three labels: delivery, address and other. One assigned label is unknown, represented by null. The small fixture lets you inspect every error and understand how coverage, precision and recall answer different questions.

You will write a codebook, construct a reviewed reference set, calculate a confusion summary, inspect label-specific failures and manage a definition change. The optional Python tool audits supplied reference and assigned labels. It is not a classifier and does not read customer text. Passing its tests does not establish production quality, label validity or representativeness of a real dataset.

The core deliverables are a codebook with examples and exclusions, a reference review log, an error ledger and a version note. The exercises ask for these artifacts in small pieces. Basic arithmetic is enough for the reasoning. Python 3.10 or later is needed only for the companion, which uses the standard library and makes no network requests.

In real work, use approved systems and minimize unnecessary personal information in review exports. A taxonomy can travel widely through dashboards and automation, so a careless label may outlive the comment that inspired it. The book's fixture avoids real customer data. Independent human technical and assistive-technology review of this edition is pending; the material is an inspectable teaching method rather than a certified classification standard.

1. Choose the classification job

Begin with the action

Fern Desk wants to route selected feedback to the team that can investigate it. Delivery questions should reach the dispatch communications owner. Address-change questions should reach the account operations owner. Other records should remain visible for review rather than being forced into whichever label sounds closest. This action-oriented purpose gives a reason for the three-way distinction.

A taxonomy used for routing may differ from one used for research. Routing often needs a single destination; research may need multiple themes. A customer can ask both where a parcel is and how to change an address. A single-label workflow needs a precedence rule for that record, while a multi-label workflow can preserve both. Do not evaluate one design as if it were the other.

State the unit and scope

The teaching unit is one summarized contact record. It is not a customer, a conversation turn or every sentence in a ticket. One primary reference label is assigned to each record. The audit treats the reference as the reviewed comparison target, while recognizing that the reference itself can be wrong. This convention makes the arithmetic clear without claiming that customer meaning is inherently single-label.

Define what the taxonomy will not do. It will not infer satisfaction, urgency or the truth of a complaint from a topic label. A record labeled delivery could be praise, confusion or a routine status question. Combining topic, sentiment and urgency into a single label creates a sparse list of combinations that is harder to apply and maintain. Keep separate dimensions separate when the workflow needs them.

Draft an acceptance contract

Write down the intended user, decisions supported, input unit, label structure and unknown policy. The initial unknown policy is simple: use null when the assigned classifier or reviewer does not make a supported assignment. Null is different from other. Other means the reference topic is outside the named categories; null means no assignment was made. Mixing those concepts inflates apparent coverage and obscures failure modes.

The GOV.UK research-analysis guidance supports organizing observations and examining interpretations with a team [R1]. This book's quantitative audit is an original teaching design built around that discipline. A label is an interpretation of an observation, so the team should be able to explain its boundary and inspect a disagreement rather than treating the label as an unquestionable fact.

Exercise 1: choose the taxonomy purpose

Write a five-field acceptance contract for a three-label routing taxonomy. Include the record unit and explain the difference between other and no assignment. Describe one reason the same labels might be inadequate for a research project examining several issues within each contact.

Continue with the full guide

This free sample ends after the introduction and Chapter 1. The complete guide contains nine teaching chapters, worked exercise solutions, primary references and a separate Python companion project. The full PDF, reflowable EPUB and project files are supplied together.

Use the complete guide to work through the remaining exercises and inspect the supplied examples. The companion code and fictional data are separately MIT licensed; the complete ebook has the single-reader terms described on its product page.

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Primary references

1. [R1] Analyse a research session

<https://www.gov.uk/service-manual/user-research/analyse-a-research-session>

Grouping observations and reviewing interpretations with a team; the quantitative audit is an original teaching design.