Customer Service Checklist

1. Is the Company on board with delivering GREAT service?
   - Do you have a customer service oriented mission statement, vision statement, and values? And do you have one for each department?
   - Does your mission support the delivery of exceptional customer service?
   - Are these statements and values updated and posted? When last updated?
   - Is your leadership team on board with the mission, vision, and values?
   - Do all employees sign off on them?
   - Do you use the mission, vision, and values as the basis for hiring the right people?

2. How do you get your people to deliver consistently GREAT customer service?
   - Does your leadership team demonstrate great customer service?
   - Do you have customer service protocols / scripts?
   - Have your people been trained on how to deliver GREAT service?
   - Do you have a process to maintain the momentum after the training?
     - Huddles, Rounding, Meetings, Feedback, etc.
     - Customer service teams?
     - Process for recognition?
     - Internal website to capture feedback / share stories / relay information?
     - Job shadowing / cross training?
   - Do you do mystery calls / visits regularly to observe service in real time?
   - Does the leadership team hold themselves and their employees accountable for delivering great service? Do they know how?

3. Do you know your customer?
   - Who are they? Internal and external?
     - What are their preferences?
     - How can you exceed expectations?
   - Do you collect their information?
     - Get their business card
     - Ask them for their email address, address and phone number
   - If online, do you collect their information before proceeding with the transaction?
   - Do you have a process to follow-up with your customers?

4. How do you know your customers are satisfied?
   - Do you have a process for getting customer feedback – on a regular basis?
     - Ask them – verbally – at the time of their visit
     - Comment cards
     - Hand them a survey – which they fill out and leave
     - Email a survey
     - Create focus groups of customers that you speak to quarterly
     - Call customers – randomly - to get their feedback
     - Collect from front-line employees
   - Are you, or someone, monitoring social media comments, forums, and rating sites?
   - Are you monitoring all customer touch points?

5. How do you handle complaints?
   - What is your formal process for handling complaints?
     - Are complaints documented?
     - Is there a process for resolution?
       - Do you keep a FAQ list and continually update it?
   - Have you and your staff been trained on how to deal with complaints?
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List of Services

- 45 – 60 Minute **Keynote** Presentation
- 90 minute, 2 Hour, ½ Day, Full Day **Seminars**
  - Customer Service Training
  - Leadership Training
  - Dealing with Irate Customer Training
  - Communication Training
- Employee **Survey/ Interviews**
- Mystery **Visits / Calls** and Reports
- Custom Tailored Customer Service **Protocols Creation**
- Customer **Surveys / Interviews**
- One-on-One **Coaching**
- Monthly Follow-Up **Consulting**

Tired of Negativity? Desire to be Happy?
Sign up for the “21 Day Happy Pants Challenge”
Send email to Barbara@BarbaraKhozam.com