

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?



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**



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