

CUSTOMER SERVICE AUDIT



Self-Audit of Your Organization's Customer Service Capabilities

In the following few pages, you can assess and audit the quality of your organization or team's customer service. There are 10 questions, and the whole assessment or audit shouldn't take more than a few minutes to complete.

What you will learn, however, could make a great difference to your organization or team. You may uncover some areas of weakness you might not have recognized before. You may also find some areas of strength that you can build upon and target for additional development to raise the level or performance of your service delivery professionals to even higher levels of mastery.

The assessment is very straight forward. For each of the 10 questions, use your best judgment or knowledge to rate the level of your agreement with each statement from strongly agree (5) to strongly disagree (1). We'll provide a little detail and explanation for the rationale supporting each question as you go. At the end of the assessment, you can tally your score and find out where your organization or team rates in terms of the quality of the current state of your customer service.

Let's get started!

1. Our customer service staff and all other employees who interact with the public are well-trained and have mastered the skills needed to handle, diffuse and retain angry customers.

Write your answer in the square to the right.

- 5 = Strongly Agree
- 4 = Agree
- 3 = Neither Agree nor Disagree
- 2 = Disagree
- 1 = Strongly Disagree

The Takeaway - Every customer interaction is an opportunity to make a difference

- ⚡ Angry customers represent opportunities to make a difference
- ⚡ Effective training can help your employees avoid costly word-choice errors that exacerbate errors with angry customers
- ⚡ Training is an investment; however, it's well worth the money saved from retaining customers

2. All of our customer service employees use an effective and uniform telephone greeting when addressing customers.

Write your answer in the square to the right.

- 5 = Strongly Agree
- 4 = Agree
- 3 = Neither Agree nor Disagree
- 2 = Disagree
- 1 = Strongly Disagree

The Takeaway - Eliminate unnecessary barriers between you and your customers

- ⚡ You get one chance to make a first impression & the way your customer service employees greet your customers is a direct reflection of your brand
- ⚡ Customers are far more likely to stick with companies that provide great service

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It takes 12 positive experiences to make up for one unresolved negative experience.

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Source: “Understanding Customers” by Ruby Newell-Leaner



In the last year, 67% of customers have hung up the phone out of frustration that they could not talk to a real person.

Excellent telephone skills and prompt replies to customers in their moment of need can save your organization lost business. In this day and age of chat and email service, a live person, fully trained to be friendly and helpful, can make all the difference.

3. Our customer service managers are well-trained in coaching skills to help their employees improve their customer service performance and results.

Write your answer in the square to the right.

- 5 = Strongly Agree
- 4 = Agree
- 3 = Neither Agree nor Disagree
- 2 = Disagree
- 1 = Strongly Disagree

The Takeaway - Front-line, customer-facing employees are crucial to our success, and the supervisors and managers leading them must be effective performance improvement coaches.

- ⚡ Few organizations train their supervisors on coaching - it's important!
- ⚡ Effective coaching by supervisors is critical to improving and maintaining high levels of mastery by employees

4. Every employee who interacts with customers is trained and skilled at presenting negative information or bad news to customers in a positive and effective manner.

Write your answer in the square to the right.

- 5 = Strongly Agree
- 4 = Agree
- 3 = Neither Agree nor Disagree
- 2 = Disagree
- 1 = Strongly Disagree

The Takeaway - We need customer service employees who are adept at delivering all types of news without alienating customers.

- ⚡ How your employees handle customer problems directly impacts your bottom line
- ⚡ Customers stick with companies whose customer service employees help them and leave companies for bad service

Americans tell an average of **9 people** about good experiences, and tell **16 (nearly two times more)** people about poor experiences.

The most cringe-worthy phrases customers don't want to hear:

"We're unable to answer your question. Please call xxx-xxx-xxxx to speak to a representative from xxx team."






"We're sorry, but we're experiencing unusually heavy call volumes. You can hold or try back at another time."

"Your call is important to us. Please continue to hold."


Source: American Express Survey

5. Our customer service employees know how to use a variety of questioning techniques in their customer interactions.

Write your answer in the square to the right.






-  5 = Strongly Agree
-  4 = Agree
-  3 = Neither Agree nor Disagree
-  2 = Disagree
-  1 = Strongly Disagree

The Takeaway - Asking the right questions is critical to understand the actual customer service problems.




-  No two customers are the same, so customer service employees need to understand how to ask the right questions to get relevant answers regardless of the type of customer they're assisting

6. New employees are well-trained on all of our customer service systems, techniques and methods within the first two weeks of starting.

Write your answer in the square to the right.

-  5 = Strongly Agree
-  4 = Agree
-  3 = Neither Agree nor Disagree
-  2 = Disagree
-  1 = Strongly Disagree

The Takeaway - Providing prompt and thorough training to new employees will help give them the confidence to deliver excellent customer service straight away.

-  Each customer service employee, when operating at full capacity, helps retain business, meaning they deliver real value to your company
-  Providing new employees with effective training to get them performing at full capacity quickly, therefore, provides a true benefit to your organization
-  Employees who believe their work matters are more engaged and deliver higher levels of service



In an era when companies see online support as a way to shield themselves from 'costly' interactions with their customers, it's time to consider an entirely different approach: building human-centric customer service through great people and clever technology. **So, get to know your customers. Humanize them. Humanize yourself. It's worth it.**



Kristin Smaby, "Being Human is Good Business"

7. Our customer service employees are highly skilled at building rapport with customers.

Write your answer in the square to the right.

- 5 = Strongly Agree
- 4 = Agree
- 3 = Neither Agree nor Disagree
- 2 = Disagree
- 1 = Strongly Disagree

The Takeaway - "Friends and colleagues' endorsements, discussed in real life or through Twitter and Facebook updates, are more likely to drive sales than even a positive user review posted on a site like Yelp or Amazon (but those matter, too)."
Jason Mittelstaedt, CMO at RightNow

- ⚡ People do business with people they like, so rapport is an important part of successful customer service for leading business organizations
- ⚡ Customer recommendations can drive new business, and customers will not recommend your business if they have bad customer service experiences
- ⚡ In the current social media environment, customer recommendations can be more important than ever

8. Customer service employees are skilled at keeping their personal emotions in check and focusing on delivering valuable and positive experiences to each customer interaction.

Write your answer in the square to the right.

- 5 = Strongly Agree
- 4 = Agree
- 3 = Neither Agree nor Disagree
- 2 = Disagree
- 1 = Strongly Disagree

The Takeaway - Customer service should be a strategic business initiative.

- ⚡ The value of excellent service far outweighs the costs of delivering effective and timely customer service training

81%



of companies with strong capabilities and competencies for delivering customer experience excellence are outperforming their competition.

Source: Peppers & Rogers Group, Customer Experience Maturity Monitor

9. Within our organization, "customer service" is a value we extend to our co-workers to the same extent, quality and level as our outside customers.

Write your answer in the square to the right.

- 5 = Strongly Agree
- 4 = Agree
- 3 = Neither Agree nor Disagree
- 2 = Disagree
- 1 = Strongly Disagree

The Takeaway - When we practice good customer service to everyone, it's apparent to our outside customers that we care.

- ⚡ Great internal customer service can set us apart from our competition
- ⚡ Employees that work well together tend to be more productive, engaged and profitable

10. Our customers are usually very happy with the level of customer service they receive from us.

Write your answer in the square to the right.

- 5 = Strongly Agree
- 4 = Agree
- 3 = Neither Agree nor Disagree
- 2 = Disagree
- 1 = Strongly Disagree

The Takeaway - Customer service surveys are very important and easy to administer, and if you aren't asking your customers how you're doing - how will you know?

- ⚡ A surprising number of your customers will complete SHORT customer satisfaction surveys - as many as 50%!

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It's very logical: There is proven ROI in doing whatever you can to turn your customers into advocates for your brand or business. **The way to create advocates is to offer superior customer service.**

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Gary Vaynerchuk,
"The Thank You Economy"



What is your Total Score ____ ?



45-50

Well done! If your customers agree with your assessment, your organization is doing a great job. Now, the challenge for high-performing organizations is maintaining or even improving on this high level of customer service. Remember, your competitors are trying to deliver great service too! [Click here](#) to find out more about how Service Skills can help you take your customer service skills to an even higher level!



30-44

This isn't bad; however, it's not ideal, either. This is about average. As you learned going through the assessment, organizations that excel at customer service are at a competitive advantage. So, what do you want to do? If you stick with the status quo, you run the risk of losing more customers than you should to slip-ups by customer service employees. But you can do something about it. [Click here](#) to learn how Service Skills can help you improve the mastery of customer service skills within your organization or team.



29 or lower

Well done. You've been candid and recognized that you need customer service help. The good news is, Service Skills has a great solution that's easy to implement and cost effective. [Click here](#) to learn more and get a short demo of one of our many helpful series.

Boost Customer
Satisfaction Levels

Elevate Teamwork &
Collaboration

Develop a More
Respectful Culture