

The Complete
Customer
Experience
Performance
Evaluation
Checklist

service 

– **Graham Harvey** CSP



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The Complete Customer Experience Performance Evaluation Checklist has been designed over many years to enable and empower business owners and managers to effectively ascertain exactly how customer focussed their respective organisations actually are.

Take your time, either individually or with your team, to work through each of the 190 questions, placing a 'tick' in each box where your answer is a definitive YES.

Then, total your score, divide it by 1.9, which will provide you with an overall percentage.

How does your organisation rate?

Disclaimer:

The information, opinions, suggestions and ideas contained in this performance evaluation instrument are based on the experience of the author and many other professionals, as well as material believed to be accurate, but not infallible. The information provided follows acceptable professional standards and all effort has been made to render this material free from error or omission. While written and presented in good faith, the author assumes no responsibility or liability for any loss or damage caused directly or indirectly from actions taken by users of this instrument. The material in this performance evaluation checklist cannot substitute for appropriate professional opinion, which would take into account individual factors, specific situations, environmental conditions, or circumstances likely to influence actions taken or avoided at any time.

Please be advised, this checklist provides general information only, and should not be seen as professional advice specific to any particular situation, problem or client.

QUESTIONS

1. Do we have a Mission, Vision, and Values statement?
2. Has it been distributed to all staff?
3. Do we review our mission, vision and values statement on a quarterly basis?
4. Is it on display in suitable places such as reception & our website?
5. Do we have a publicly stated Service Charter for our business, outlining key performance indicators in all areas of customer service, including opening hours, customer confidentiality, response times, complaints procedures and redress?
6. Is our Service Charter on display in suitable places such as reception, our website, and all members of staff have a copy?
7. Are our business trading hours based on a detailed analysis of knowing what our customers want?
8. Is all our directional signage sufficient, clear and located in the best place for our customers to see and read?
9. Is there suitable and highly readable road signage at crossroads near our business?
10. Are our signs positive, not negative? Free from words like NO and DON'T?
11. Do we have sufficient car-park spaces for our customers?
12. Are the car-park spaces nearest our front door reserved for customers and not senior management or staff?



13. Is there clear signage for all car-parking areas?
14. Are details of all parking options and locations listed on our company website?
15. Do we have a daily procedure for ensuring that the external areas of our premises, including footpaths and car-parks, are kept clean, tidy and free of rubbish at all times?
16. Are all windows cleaned inside and out on a very regular basis?
17. Do we have a 'welcome' sign or doormat at the entrance of our premises?
18. Is the entrance to our premises covered to protect customers from the sun and rain?
19. Is there a welcoming 'feel' about the entrance to our business premises?
20. Do we have a specifically selected fragrance or 'signature scent' for our business?
21. Are our internal and/or external displays and promotions changed on a regular basis?
22. Does our staff rostering provide for sufficient staff at all times to serve our customers?
23. Do we have back-up systems for peak periods?
24. Are our staff empowered with the appropriate authority to call on extra staff if and whenever necessary?
25. Does our corporate culture insist upon the highest standard of manners at all times?
26. Are 'please' and 'thank you' used by all staff at all times, irrespective of who is talking to whom?



27. Do we have uniformity in how we greet our customers?
28. Do we have a set format and time frame for answering the telephone?
29. Do we have a specific telephone script detailing the exact words we use when answering the telephone?
30. Are our words of greetings understood and used by all staff at all times?
31. Do we have human beings answering our phones and not technology creating barriers between us and our customers?
32. Do our customers have something to listen to when they are placed on hold on the telephone?
33. Has the music or message on hold been chosen specifically for our customers?
34. Do we have an effective after-hours telephone answering service?
35. Are all our staff fully trained in establishing rapport with our customers?
36. Do our staff know the power of a smile?
37. Do they know how to smile?
38. Do all our staff know the power of a handshake?
39. Do they know how to shake hands correctly?
40. Do our staff know the importance of looking customers in the eye when shaking hands and when speaking with them?
41. Are our staff pleasant and courteous at all times to our customers?



42. Do we address customers on a first-name basis wherever possible?
43. Do we have systems in place to ensure that we pronounce our customers' names correctly?
44. Do we have systems in place to ensure that we spell our customers' names correctly?
45. Do we have a dedicated meeting space where we can quietly and privately meet with customers?
46. Are all our brochures and conversations with customers devoid of industry jargon and legalese?
47. Are all our brochures printed in a font style & point size that is easily readable by our customers?
48. Do we have adequate supplies of brochures and information flyers available at all times?
49. Do we offer customers a range of beverage options, including tea, coffee, juice and water, when we offer them a drink?
50. Do we provide freshly ground espresso or plunger coffee and NOT the cheap instant variety for both our customers & staff?
51. Do we spend time getting the food right for staff and/or customer events?
52. Do we have a spring-water fountain(s) available for both customers and staff?
53. Do we provide free Wi-Fi for our customers?
54. Has the furniture in our reception area been consciously selected to comfortably cater for our full range of customers?



- 55. Has all the furniture throughout our business been consciously selected to comfortably cater for our full range of customers and staff?
- 56. Is all furniture regularly checked & highly maintained?
- 57. Are the magazines in our reception area the latest issues and are they in good condition?
- 58. Do we subscribe to two or three different magazines solely for our reception area?
- 59. Are out-of-date magazines routinely removed?
- 60. Do we have a copy of today's newspaper available for customers in reception?
- 61. Do we have a system in place for ensuring that pens and other items and utensils provided for guest convenience are in good working condition?
- 62. Do we place fresh flowers in our customer reception area on a regular basis?
- 63. Do we have a box of toys for our customers' children in our reception area?
- 64. Are all our staff fully trained in the use of cash registers, credit card and EFTPOS equipment?
- 65. Are all staff able to quickly and efficiently replace paper tapes in all machines so as to minimise delays with waiting customers?
- 66. Do we have systems in place to ensure our customers are served 'in-turn'?
- 67. Do we have readily available 'mud-maps' so customers can easily move around our business?



- 68. Are our staff readily accessible for customers seeking assistance or information?
- 69. Do we put maximum thought into the design of our business cards?
- 70. Would photo-cards be beneficial?
- 71. Do we have information on the reverse side of our business cards?
- 72. Is the font style & point size on our business cards easily readable?
- 73. Do we provide business cards to all staff?
- 74. Do we have a goal to hand out a specific number of business cards every week?
- 75. Are our brochures designed with customer 'benefits' as the primary focus, rather than being feature focused?
- 76. Do we update our brochures on a regular basis?
- 77. Do we print sufficient quantities and are they displayed in professionally designed brochure racks?
- 78. Do we provide professional uniforms for our staff?
- 79. Are our staff involved in the design or choice of uniform?
- 80. Do we have explicit dress and grooming standards including policies on tattoos, piercings & personal hygiene?
- 81. Do we have policies and remedial actions in place for non-adherence?
- 82. Do we have well designed easy-to-read name badges for all staff that are to be worn at all times?



- 83. Do we have procedures in place to respond to our customers in emergency situations?
- 84. Do we have a company policy for returning telephone calls?
- 85. Is this clearly stated in our Service Charter?
- 86. Do we have a company policy for responding to emails?
- 87. Is this clearly stated in our Service Charter?
- 88. Do all members of staff have their own unique email signature containing full business contact details including their direct telephone number?
- 89. Do we deal with our customers face-to-face wherever possible?
- 90. Do we have daily cleaning, dusting and vacuum rituals and is the cleanliness of our working environment a top priority?
- 91. Are our public toilets kept in immaculate condition?
- 92. Are they inspected for cleanliness on a scheduled basis?
- 93. Do we have specific criteria in place for the quality of our toilet paper & hand towels?
- 94. Do we have specific criteria in place for the quality of our soaps, toiletries and air fresheners for our toilets?
- 95. Are our staff toilets and lunchrooms areas kept in immaculate condition?
- 96. Are smoking areas limited and clearly designated?
- 97. Do we have clearly stated safety policies and do we constantly communicate the importance of safety to all our staff?



- 98. Do we have background music in retail, office, warehouse & factory areas for our staff and customers?
- 99. Is the type and volume appropriate?
- 100. Are the pictures and posters that hang on our walls appropriate?
- 101. Do we have specific temperature settings for the different areas of our business?
- 102. Are they suitable for the nature of our business?
- 103. Do we have clearly stated 'team rules of the game' or a 'company code of conduct'?
- 104. Were staff involved in establishing our 'code of conduct'?
- 105. Do we have agreed disciplinary policies and consequences in place for non-adherence?
- 106. Do we have internal communication systems and procedures in place to keep everyone informed on all aspects of company developments and performance?
- 107. Do we know that our internal communication systems are effective?
- 108. Do we have a regular staff newsletter?
- 109. Do we celebrate staff birthdays?
- 110. Would giving staff the day off for their birthday be a suitable gift from the company?
- 111. Do senior management regularly 'mingle with the troops'?
- 112. Does everybody know and refer to everyone else in the company by name, preferably by their first name?



- 113. Do senior management have lunch with everyone else rather than in separate executive lunchrooms?
- 114. Does our culture allow for people to have fun at work including items of a purely spontaneous nature?
- 115. Do we recognise employees who have gone beyond the call of duty or who have achieved success in some form of business or personal endeavour?
- 116. Do we have monthly rituals in terms of special events such as 'free dress' days, barbecues, movie outings, family picnics, etc.?
- 117. Do we have a staff noticeboard?
- 118. Do we have a staff (electronic) suggestion box?
- 119. Do we have a customer (electronic) suggestion box?
- 120. Does our culture actively encourage contributions from staff to help make our company more successful?
- 121. Do we have regular events involving partners and families such as an end-of-year staff family picnic or end-of-financial-year dinner for staff?
- 122. Do we support particular charities?
- 123. Do we as a team support annual door-to-door events such as the Red Shield Appeal for the Salvation Army?
- 124. Does our company have an environmental 'conscience'?
- 125. Is our commitment to 'green' policies clearly stated in our Service Charter?
- 126. Do we have a well-refined staff recruitment process in place ensuring we hire the right people with a strong passion for service?



- 127. Do we have a structured induction process for all new members of staff?
- 128. Do we have Occupational Health and Safety training for all staff on a regular basis?
- 129. Do we have a structured 360-degree performance review process for all members of staff?
- 130. Do we instigate an annual training-needs analysis to ascertain training requirements for all of our staff?
- 131. Do we have a strong commitment to staff training and professional development?
- 132. Do we have a specific percentage of annual payroll allocated to staff development?
- 133. Do all staff from CEO to office junior participate in annual customer service training?
- 134. Do we hold weekly team meetings involving all staff?
- 135. Do we conduct regular, (ideally every 90 days) 'future-storming' sessions to generate new and better ways of growing our business?
- 136. Would engaging the services of an external facilitator to conduct these 'future-storming' sessions be beneficial?
- 137. Do we regularly conduct internal focus groups with our staff?
- 138. Do we regularly conduct external focus groups with our customers?
- 139. Do we conduct customer surveys?
- 140. Do all members of senior management spend time at the front desk, call centre or similar at least once a month?



- 141. Do we have systems in place to regularly 'benchmark' competitor activities and other industry innovations?
- 142. Do we have a customer-friendly, easy-to-navigate website?
- 143. Are our customers able to purchase our goods or book our services online via our website?
- 144. Do we have simple forms and procedures within our organisation?
- 145. Do we constantly strive to reduce bureaucracy at all levels?
- 146. Do we have a range of delivery options for our customers?
- 147. Do our customers know what our delivery options are?
- 148. Do we have a complete range of payment options for our customers?
- 149. Do we accept all major credit cards and have EFTPOS available?
- 150. Are our customers aware of those options?
- 151. Are all payment options including BSB details on all invoices?
- 152. Do we have a policy and schedule for keeping in touch with our customers?
- 153. Do we have a policy in place to contact our customers within a specific time frame after they have done business with us?
- 154. Do we ensure that we are in touch with our customers every 90 days?
- 155. Do we have a Customer Relationship Management (CRM) programme in place?



- 156. Do we place a priority on ensuring our customer database is kept current and accurate at all times?
- 157. Do we have a regular customer newsletter? (Printed or electronic)
- 158. Do we have specially printed 'thank you' cards?
- 159. Do we use these cards on a regular basis throughout our organisation?
- 160. Do we send out company branded birthday, anniversary and festive cards to our customers?
- 161. Do we have procedures in place to ensure that our company vehicles are kept in immaculate condition at all times?
- 162. Do we provide advanced driving lessons for our staff?
- 163. Do we encourage and/or reward courteous and responsible driving?
- 164. Are all our company vehicles appropriately sign-written, showing what we do in conjunction with who we are?
- 165. Do we have a culture of honesty where telling the truth is totally non-negotiable?
- 166. Is punctuality one of our most revered values?
- 167. Do we ensure that all members of staff understand the importance of always being on time?
- 168. Do we make and keep specific appointment times with our customers?
- 169. Do we have publicly stated 'on-time' guarantees and are they clearly stated in our Service Charter?



- 170. Do we consciously keep our letters and documentation as short as possible?
- 171. Do we have product and service warranties and guarantees?
- 172. Do we have a refunds and returned goods policy?
- 173. Are all warranties, guarantees and returns policies clearly stated in our Service Charter?
- 174. Do we place a priority on the high-speed delivery of our products and services to our customers?
- 175. Are we constantly looking for and generating new ways of adding value for our customers?
- 176. Where appropriate, do we supply umbrellas for use by our customers in inclement weather?
- 177. Do we carry our customer's purchases to and from their vehicles?
- 178. Do we have a clearly thought-out customer complaints and feedback process?
- 179. Are all staff aware of how to action the complaints procedure?
- 180. Do staff have the authority to spend a certain amount of money to rectify a customer complaint without having to seek permission from senior management?
- 181. Do we have a complaints and feedback register that is regularly monitored to identify areas of improvement in our service delivery systems and procedures?
- 182. Do all our staff know that they are always on duty and do they understand and appreciate that their behavior, both on and off the job, reflects on the reputation of the organisation they work for?



183. Do we apply as much attention to our internal service between staff as we do our external service towards customers?
184. Do we show our appreciation to both our internal and external customers on a regular basis?
185. Do we have a procedure in place to secure a constant flow of referrals from our existing customers?
186. Do we regularly seek and receive testimonial letters from delighted clients?
187. Do we have regular brainstorming sessions to explore ways of better serving our customers?
188. Is our organisation a great place to work?
189. Do we have a policy of always exceeding our customers' expectations?
190. Is our organisation renowned for its customer service excellence?

Add up total number of ticks -----

Divide your score by 1.9

(this becomes your overall score out of 100)



WHAT YOUR SCORE MEANS:

- 0 – 20%** Your organisation is likely stuck in an industrial-age time warp. Customer service may be talked about, however there is little evidence to demonstrate that you are really serious about implementing it. Good luck for the future, you will need it.
- 21 – 40%** Whilst there are encouraging signs that certain aspects of customer service are being instituted, it's time to shift into higher gear by focusing on delivering far greater service to both your internal and external customers. Your future will depend on it.
- 41 – 60%** Average equals best of the worst. You are definitely heading in the right direction, but you still have a long way to go to match those organisations achieving world-class customer service excellence.
- 61 – 80%** Well done, so far. Customer service is obviously a priority at your place of business, but there is still plenty of room for improvement if you are serious about becoming an industry leader. Keep up the good work.
- 81 – 90%** Congratulations! Hopefully you and your team are enjoying the fruits of delivering service excellence, however there's no time to be complacent. Your competitors are most likely benchmarking your service standards as we speak.
- 91 – 100%** WOW! Super Congratulations!
Achieving this level of customer service excellence is a result of your uncompromising commitment to be the best in your field and to deliver a stand out experience for your customers. Keep up your great work... you are a credit to your industry.

Remember that today's laurels are tomorrow's compost.

Professional Speaker, Service Designer and Business Coach Graham Harvey is the bestselling author of **Seducing the Vigilante Customer: 101 winning strategies to attract and retain happy customers and healthy profits**. He is recognised as one of Australasia's foremost thought leaders on Service Design, Customer Experience and Relationship Marketing.

Commencing his business consultancy in 1986, he continues to work with a multitude of organisations throughout the Asia Pacific region helping them grow their business by achieving greater clarity of future, and designing and developing innovative customer experience and relationship marketing strategies.

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