

## **The Customer Service Audit**

The following template includes a wide variety of items that are often applicable to customer service. You may use the template as is, or (preferably), you may select certain items from it that seem most relevant to your situation and delete the others.

If you create your own audit from this template, you might want to consider numbering each item to help you keep track of them later. This will prove especially helpful if you administer a large number of audits and need to summarize the findings statistically.

In analyzing the results of a customer service audit, look for disparities between the first and second ratings:

- \* If you are doing well on an important service attribute, then you can leave well enough alone.
- \* If you are doing poorly on an important service attribute, then you need to improve your performance on it right away.
- \* If you are doing well on an unimportant attribute, consider putting less effort and resources into it so you can emphasize a more important attribute.

### Customer Service Element

### How important is it?

### How do we do on it?

#### **Politeness of personnel**

\_\_not important

\_\_poor

\_\_slightly important

\_\_fair

\_\_important

\_\_good

\_\_very important

\_\_excellent

#### **Getting job done right the first time**

\_\_not important

\_\_poor

\_\_slightly important

\_\_fair

\_\_important

\_\_good

\_\_very important

\_\_excellent

**Apologizing for delays**

___not important	___poor
___slightly important	___fair
___important	___good
___very important	___excellent

**Prompt warranty work**

___not important	___poor
___slightly important	___fair
___important	___good
___very important	___excellent

**Not arguing over who's responsible**

___not important	___poor
___slightly important	___fair
___important	___good
___very important	___excellent

**Things ready when promised**

___not important	___poor
___slightly important	___fair
___important	___good
___very important	___excellent

**Things made convenient for customer**

___not important	___poor
___slightly important	___fair
___important	___good
___very important	___excellent



**Friendliness of personnel**

<input type="checkbox"/> not important	<input type="checkbox"/> poor
<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
<input type="checkbox"/> important	<input type="checkbox"/> good
<input type="checkbox"/> very important	<input type="checkbox"/> excellent

**Helping to solve problems**

<input type="checkbox"/> not important	<input type="checkbox"/> poor
<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
<input type="checkbox"/> important	<input type="checkbox"/> good
<input type="checkbox"/> very important	<input type="checkbox"/> excellent

**Providing useful information**

<input type="checkbox"/> not important	<input type="checkbox"/> poor
<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
<input type="checkbox"/> important	<input type="checkbox"/> good
<input type="checkbox"/> very important	<input type="checkbox"/> excellent

**Being available when needed**

<input type="checkbox"/> not important	<input type="checkbox"/> poor
<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
<input type="checkbox"/> important	<input type="checkbox"/> good
<input type="checkbox"/> very important	<input type="checkbox"/> excellent

**Performing only the requested work**

<input type="checkbox"/> not important	<input type="checkbox"/> poor
<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
<input type="checkbox"/> important	<input type="checkbox"/> good
<input type="checkbox"/> very important	<input type="checkbox"/> excellent

**Performing only the necessary work**

<input type="checkbox"/> not important	<input type="checkbox"/> poor
<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
<input type="checkbox"/> important	<input type="checkbox"/> good
<input type="checkbox"/> very important	<input type="checkbox"/> excellent

**Keeping things neat and clean**

<input type="checkbox"/> not important	<input type="checkbox"/> poor
<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
<input type="checkbox"/> important	<input type="checkbox"/> good
<input type="checkbox"/> very important	<input type="checkbox"/> excellent

**Reminding customers when supplies are needed**

<input type="checkbox"/> not important	<input type="checkbox"/> poor
<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
<input type="checkbox"/> important	<input type="checkbox"/> good
<input type="checkbox"/> very important	<input type="checkbox"/> excellent

**Reminding customers when maintenance is needed**

<input type="checkbox"/> not important	<input type="checkbox"/> poor
<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
<input type="checkbox"/> important	<input type="checkbox"/> good
<input type="checkbox"/> very important	<input type="checkbox"/> excellent

**Responding quickly to complaints**

<input type="checkbox"/> not important	<input type="checkbox"/> poor
<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
<input type="checkbox"/> important	<input type="checkbox"/> good
<input type="checkbox"/> very important	<input type="checkbox"/> excellent

<b>Responding fairly to complaints</b>	<input type="checkbox"/> not important	<input type="checkbox"/> poor
	<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
	<input type="checkbox"/> important	<input type="checkbox"/> good
	<input type="checkbox"/> very important	<input type="checkbox"/> excellent

<b>Matching competitors' prices</b>	<input type="checkbox"/> not important	<input type="checkbox"/> poor
	<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
	<input type="checkbox"/> important	<input type="checkbox"/> good
	<input type="checkbox"/> very important	<input type="checkbox"/> excellent

<b>Matching competitors' capabilities</b>	<input type="checkbox"/> not important	<input type="checkbox"/> poor
	<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
	<input type="checkbox"/> important	<input type="checkbox"/> good
	<input type="checkbox"/> very important	<input type="checkbox"/> excellent

<b>Answering the phone quickly</b>	<input type="checkbox"/> not important	<input type="checkbox"/> poor
	<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
	<input type="checkbox"/> important	<input type="checkbox"/> good
	<input type="checkbox"/> very important	<input type="checkbox"/> excellent

<b>Not pestering with irritating sales pitches</b>	<input type="checkbox"/> not important	<input type="checkbox"/> poor
	<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
	<input type="checkbox"/> important	<input type="checkbox"/> good
	<input type="checkbox"/> very important	<input type="checkbox"/> excellent

**Providing loaner equipment when yours is being repaired**

\_\_\_not important

\_\_\_poor

\_\_\_slightly important

\_\_\_fair

\_\_\_important

\_\_\_good

\_\_\_very important

\_\_\_excellent

**Billing accurately**

\_\_\_not important

\_\_\_poor

\_\_\_slightly important

\_\_\_fair

\_\_\_important

\_\_\_good

\_\_\_very important

\_\_\_excellent

**Not using rude letters to collect bills**

\_\_\_not important

\_\_\_poor

\_\_\_slightly important

\_\_\_fair

\_\_\_important

\_\_\_good

\_\_\_very important

\_\_\_excellent

**Not using rude phone calls to collect bills**

\_\_\_not important

\_\_\_poor

\_\_\_slightly important

\_\_\_fair

\_\_\_important

\_\_\_good

\_\_\_very important

\_\_\_excellent

**Not stuffing bills with junk-mail advertisements**

\_\_\_not important

\_\_\_poor

\_\_\_slightly important

\_\_\_fair

\_\_\_important

\_\_\_good

\_\_\_very important

\_\_\_excellent

<b>Providing frequent-user benefits</b>	<input type="checkbox"/> not important	<input type="checkbox"/> poor
	<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
	<input type="checkbox"/> important	<input type="checkbox"/> good
	<input type="checkbox"/> very important	<input type="checkbox"/> excellent

<b>Honoring frequent-user offers fairly without tricky small print</b>	<input type="checkbox"/> not important	<input type="checkbox"/> poor
	<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
	<input type="checkbox"/> important	<input type="checkbox"/> good
	<input type="checkbox"/> very important	<input type="checkbox"/> excellent

<b>Informing customers quickly and fully about problems</b>	<input type="checkbox"/> not important	<input type="checkbox"/> poor
	<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
	<input type="checkbox"/> important	<input type="checkbox"/> good
	<input type="checkbox"/> very important	<input type="checkbox"/> excellent

<b>Making up for mistakes or delays with offers of real value</b>	<input type="checkbox"/> not important	<input type="checkbox"/> poor
	<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
	<input type="checkbox"/> important	<input type="checkbox"/> good
	<input type="checkbox"/> very important	<input type="checkbox"/> excellent

<b>Being reliable</b>	<input type="checkbox"/> not important	<input type="checkbox"/> poor
	<input type="checkbox"/> slightly important	<input type="checkbox"/> fair
	<input type="checkbox"/> important	<input type="checkbox"/> good
	<input type="checkbox"/> very important	<input type="checkbox"/> excellent



**Being consistent and predictable**

\_\_\_not important

\_\_\_poor

\_\_\_slightly important

\_\_\_fair

\_\_\_important

\_\_\_good

\_\_\_very important

\_\_\_excellent

**Being creative at problem-solving**

\_\_\_not important

\_\_\_poor

\_\_\_slightly important

\_\_\_fair

\_\_\_important

\_\_\_good

\_\_\_very important

\_\_\_excellent

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