CUSTOMER SERVICE IMPROVEMENT CHECKLIST & GUIDE

This checklist serves to give you assistance in figuring out the strengths and weaknesses of your commercial establishment which will help you improve in the quality of service you give your customers and/or clients.

| **EXAMINATION OF ORGANIZATIONAL CULTURE** | |
| --- | --- |
| **Description of Tasks** | **Remarks** |
| 1. Encourage a relationship and/or culture within your commercial establishment which will enable you to get close to your customers and/or clients. |  |
| 1. Train the staff who will serve as your front-liners on the “customers first” perspective because those staff who are not customer-focused will likely endanger the reputation and the success of your commercial establishment due to the procurement of inappropriate decisions, the failure to respond to changing circumstances exhibiting an appropriate demeanor, and/or the negligence to serve the customers and/or clients in a way that promotes and establishes their loyalty to the commercial establishment. |  |
| 1. Implement a program within your commercial establishment which promotes and encourages long-term organization culture change in the event that the organization culture your commercial establishment adapts to is not in line with the customer-focused approach. |  |
| 1. Bear in mind that all the departments of your commercial establishment which consists the organization is involved with and is associated with serving your customers and/or clients. |  |
| 1. Support each other within the department both internal and external staff belong to by making the internal adept staff experience being the front-liners of the commercial establishment to instill in them a customer-focused approach and/or culture even when working on the inside offices of the commercial establishment. |  |
| 1. Increase awareness of the top management on the happenings within the commercial establishment by involving themselves in being front-liners themselves and procure strategic formulations and/or decisions to continue promoting the customer-focused approach and/or culture within the commercial establishment. |  |

| **IDENTIFICATION OF CUSTOMERS AND/OR CLIENTS** | |
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| **Description of Tasks** | **Remarks** |
| 1. Those who utilize the end products you offer, either internal and/or external, are to be considered as the customers and/or clients of your commercial establishment. |  |
| 1. Distinguish between who are the purchasers and who are the end-users of the target market your commercial establishment is focused on. |  |

| **CUSTOMER AND/OR CLIENT PROFILES** | |
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| **Description of Tasks** | **Remarks** |
| Keep a record of your customers and/or clients’ demographic classification such as:  ◻ Gender  ◻ Age  ◻ Civil Status  ◻ Location |  |
| Aside from the demographics, keep updated on your customers and/or clients’ background as follows:  ◻ Residence Ownership  ◻ Lifestyle |  |
| In the event that the customers and/or clients you have are involved in certain businesses, gather the following information:  ◻ Sales and Revenues  ◻ Number of Staff and Employees  ◻ Business Industry Classification  ◻ Years of Experience in the Industry  ◻ Credit Report and Rating |  |
| Come to a conclusion within your commercial establishment on what approach you are going to adopt in order to collate the basic characteristics of your customers and/or clients. You can look into the following methods:  ◻ Survey Questionnaires  ◻ Market Research  ◻ Discussions within user and/or focus groups  ◻ Customer Audits |  |
| Combine several methods in order to gain clear and accurate analyzation of your customers and/or clients’ profile. |  |
| Take advantage of opportunities to meet and to get in touch with the customers and/or clients of your commercial establishment within its premises or theirs in a series of customer care programs, industry meetings and partnerships, and/or membership groups. |  |

| **EVALUATION OF CUSTOMERS’ OPINIONS** | |
| --- | --- |
| **Description of Tasks** | **Remarks** |
| 1. Make accurate perceptions on what your customers and/or clients’ needs and not just create untested and/or unwarranted assumptions on what the customers and/or clients’ think. |  |
| 1. Provide effort to know what your customers and/or clients’ need and make it a point to know the following information:   ◻ Reasons of customers and/or clients to buy a certain product;  ◻ The method on how customers and/or clients use that certain product;  ◻ The opinion of customers and/or clients on the product;  ◻ The likeliness of the customers and/or clients in choosing your product over your competitors;  ◻ The experience and the feedback of your customers and/or clients on the utilization of the product. |  |
| 1. Determine the influence of your customers and/or clients in purchasing certain products and analyze on how you can use such influences to the benefit of your commercial establishment. |  |
| 1. Execute an extensive research on the issues of customers and/or clients’ influences, opinions, and/or attitudes toward the purchase of certain products. |  |
| 1. Discuss with the frontlines of your commercial establishment for you to know what satisfies or dissatisfies the customers and/or clients of your commercial establishment. |  |
| 1. Create a channeling procedure with which your frontline staff can report and communicate to the management of your commercial establishment with regard to the satisfaction and/or the dissatisfaction of your customers and/ clients. |  |
| 1. Establish a team which will focus only in catering to the concerns of the customers and/or clients of the commercial establishment otherwise known as “customer service support”. |  |

| **COURSES OF ACTION RELATIVE TO FINDINGS** | |
| --- | --- |
| **Description of Tasks** | **Remarks** |
| 1. Examine the results of the research by interpreting the data acquired and publicize the findings you have collated. |  |
| 1. Make use of the findings you have acquired in order to determine what actions to take to maintain your competitive advantage within the market. |  |
| 1. Include your staff in maintaining your competitive advantage by continuously promoting and/or exhibiting the “customer first” policy within your commercial establishment. |  |
| 1. Always monitor and pay close attention to the needs of your customers and/or clients through implementation of various research methods. |  |
| 1. Take into consideration and utilize the advantages of the Internet in reaching out to your customers and clients with your products and your commercial establishment information as a whole. |  |

| **COMPANY-CUSTOMER FEEDBACKS** | |
| --- | --- |
| **Description of Tasks** | **Remarks** |
| 1. Inform your customers of how you value them and their needs through promotion of your mission and vision statements and reiteration of your commercial establishment’s commitment to the fulfillment of their needs. |  |
| 1. Encourage the customers and/or clients of your commercial establishment to provide suggestions, new ideas, and/or errors to aid in the improvement of its customer service. |  |
| 1. Create opportunities for your customers and/or clients to have a chance to gain rewards from the commercial establishment for sharing their opinions. |  |
| 1. Integrate the customer-focused approach in all your business activities and/or transactions. |  |
| 1. Avoid the creation of assumptions when the customers and/or clients of the commercial establishment are involved. |  |

**CUSTOMER SERVICE IMPROVEMENT**

The following list will help you identify your strengths and weaknesses to help you improve the quality of service your business is providing to your clients. It is a fact that it costs about five times more to get a new customer than to keep an existing one. It is worth doing all it takes to keep your actual clients.

**EXAMINE YOUR BUSINESS CULTURE**

* You are unlikely to get close to your customers unless the culture of your organisation encourages such a relationship. Staff should be trained to think "customer first" – those who are not customer-focused can endanger the success of the business by making inappropriate decisions, failing to respond to changing situations appropriately or quickly enough, or neglecting to serve customers in a way that promotes their loyalty.
* If the culture in your business does not support a customer-focused approach, implement a programme of long-term culture change.
* Remember that every section of your organisation has customers. Staff in direct contact with external customers cannot provide effective service without the internal support of colleagues all along the chain. To encourage internal service departments to adopt an outward-looking customer focus, their operators might work for a week or two in the department they serve.
* Customer focus needs to pervade every level of the business. How often do your key decision-makers and strategy formulator’s deal face to face with customers? Time on the front line would increase their awareness.

**IDENTIFY YOUR CUSTOMERS**

* Your customers are those who use the output of your work. They may be internal to your business (for example, your personnel function has all employees as its customers) or external (members of the public, other businesses, or government or public bodies).
* In identifying customers, distinguish between purchasers and ‘end users’. You will probably wish to compile a database so you can profile your customers.

**PROFILE YOUR CUSTOMERS**

A wide range of factors influences customer behaviour, for example, if you are selling to individuals:

* Gender – particularly where the purchaser or ‘end user’ is not the sole decision -maker;
* Age – different age ranges being more susceptible to targeting by some products than others;
* Marital status – especially combined with other factors such as children and disposable income;
* Homeowner – indicating specific needs and responsibilities that relate to buying patterns;
* Location – urban consumers differ from rural ones; regions differ culturally and economically;
* Lifestyle – since all customers have individual activities, interests, and opinions.

If selling to businesses, you should look at factors like:

* Revenues
* Number of employees
* Industry
* Number of years in business
* Credit rating

These factors become more useful when they are analysed in combination – for example, age, homeowners, and a number of dependent children can indicate the likely amount of a customer's disposable income.

Decide how to approach your customers to find out their basic characteristics. It may not be possible to ask every customer individually, but other fruitful approaches exist, for example:

* Market research
* Questionnaires
* Focus-group discussions
* Customer audits
* Attitude surveys

Take advantage of opportunities to meet business customers at their premises or at yours in a series of Open House or Customer Care Programmes.Membership of user groups, industry liaison meetings, or partnerships arising out of new product development are also ways to reach your customers.

**ASSESS YOUR CUSTOMERS' OPINIONS AND ATTITUDES**

Businesses with an inaccurate perception of their customers' needs most likely:

* make untested and unwarranted assumptions about what customers think;
* rely on weak anecdotal evidence;
* accord too much weight to atypical complaints.

If you don't make an effort to find out what your customers think, you can be caught off balance when they go elsewhere. If you don't know why they are going elsewhere, you can't identify corrective actions. Besides factual information about your customers, find out:

* why customers buy your product or use your service;
* how they use it;
* what their opinion is of your product or service;
* why they choose your offering over the competition;
* what their experience is of your product or service in terms of performance and after-sales care.

Attitudes and opinions are hard to quantify, and many factors influence a decision to purchase or to remain loyal to a particular brand. Customers may be influenced as much or more by their impressions of service – courtesy, promptness, etc. – as by the quality of a product. Exploring these issues requires detailed research, and if you do not have the adequate in-house expertise, you may wish to use an external research agency.

Listen to your frontline staff, who are at the forefront of first hand comments from customers about their satisfaction and dissatisfaction. Consider setting up a procedure for reporting this information. Channels usually employed for customer service can also be used to solicit customers' opinions by an open dialogue that is meaningful to the customer. Such channels include customer charters, warranties, statements (and monitoring) of performance standards, open and willing acceptance of penalties for noncompliance, and refunds in cases of non-satisfaction.

**TAKE ACTION ON YOUR FINDINGS**

Analyse the results of your research, interpret the data, and publicise your findings. You can use your findings to identify where you need to take action to maintain your competitive advantage. It is important to involve your staff in this process; encourage everyone to think "customer first."

It is an ongoing process to pay attention to your customers' needs..It is worth considering establishing a regular research project. To introduce methods of soliciting customers' suggestions and creating response mechanisms or initiating procedures that constantly monitor your market.

**USING THE INTERNET TO IMPROVE CUSTOMER FOCUS**

The internet is increasingly becoming the primary way that customers select items for purchase, specify designs, and submit comments and suggestions on products and services. Used wisely, the internet permits a business to build a closer relationship with its customers than ever before.

**GIVE FEEDBACK TO CUSTOMERS**

It is important to let your customers know that you value their needs and ideas. It may mean publishing a revised mission statement reiterating your commitment to fulfilling their needs or publicising results of surveys and details of new products or product amendments as a result of the research.

Feedback is not a one-off event. It is a continuous process that informs customers of your businesses’ response to successes, mistakes, and new ideas and that encourages further dialogue.

DOS AND DONTS FOR GETTING CLOSER TO CUSTOMERS

Do:

* Look at ways to reward customers for sharing their likes and dislikes.
* Make sure your business culture encourages staff to think "customer first."
* Integrate customer focus with other business activities – make it a cross-departmental, cross-functional initiative.

Don't

* Don't make assumptions about what people think without testing them yourself.
* Don't rely on data from a small sample of customers.
* Don't react too hastily to vociferous complainers – see whether other customers feel the same way.

