



CUSTOMER EXPERIENCE - CUSTOMER SERVICE BASELINE & BENCHMARK TOOL

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QUESTIONNAIRE FOR CEO or EXECUTIVE DIRECTOR

Introduction. How to use this valuable tool

This self-evaluation and assessment tool has been developed to assist call centre and customer service or customer experience executives and managers to ascertain the relative state of “customer service” within their operational environment, and within the context of the organisation as a whole.

By carefully and honestly thinking through each question and section, and diligently completing the ‘Notes and Additional Information or Instructions’ after each section, you will have the logical, structured basis for an executive-level report or to support your motivations for changes or to obtain the appropriate resources.

This tool will assist you to identify and to prioritise critical areas or your operation that may need urgent attention.

Section 1 – What do you expect your front line staff to know?

How important is it that your front line staff know ...	Very Important	Important	Not Important
1 their own areas of responsibility and the limits of what they can do to help customers without permission?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 the legislation and regulations that apply to your industry and how this affects their work with customers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 the performance targets of your organisation and how they can help to meet them?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 how their appearance and behaviour affects what the customers think about the organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 the rules and procedures regarding the methods of communication used by your organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 the importance of customer loyalty and their role in achieving this?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 who the major competitors of your organisation are?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

NOTES / ADDITIONAL INFORMATION or CEO’s INSTRUCTIONS



Section 2 – Reliable Customer Service

How important is it that your front-line staff are able to...	Very Important	Important	Not Important
9 organise themselves without being constantly told what to do?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10 use their own initiative when unexpected things happen e.g. a breakdown of systems, staff absence etc?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11 continually work to a high standard to meet customers' needs and expectations?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12 impress the customer by giving additional help and support?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13 realise when negative comments made by customers should be passed to senior staff?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14 follow a script when communicating with customers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15 use their own words and language when communicating with customers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16 understand the implications of staff sickness or holidays for maintaining service?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17 recognise when a system or procedure is going wrong and alert others to this?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18 positively support organisational policy or procedure changes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19 select the best method of communication to suit individual customers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20 take as long as necessary to deal with a customer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21 work with customers within a timeframe specified by your organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Section 3 – Problems and Complaints

How important is it that your front line staff ...	Very Important	Important	Not Important
23 act positively when customers complain or have a problem?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24 let management know about systems and procedures that are causing problems?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25 can work out the advantages and disadvantages for the customer of solving their problems in different ways?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26 can work out the advantages and disadvantages for the organisation of solving customer problems in different ways?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27 keep customers informed and updated when they are dealing with a problem or complaint?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28 understand how solving customer problems can improve customer loyalty?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29 can make a compromise about what the customer wants and what the organisation can offer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30 monitor the situation until it is successfully resolved?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
31 can confidently negotiate with customers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Section 4 – Continuous Improvement

How important is it that your front line staff ...	Very Important	Important	Not Important
33 know how service improvements affect customer satisfaction?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34 can organise, collect and analyse feedback from customers if asked to do so?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
35 can identify specific changes that need to be made, based on the analysis of customer feedback?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
36 can negotiate changes that need to be made with other team members?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
37 recommend changes that may improve customer service to senior managers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
38 can organise and implement changes that will improve customer service?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
39 monitor the effects of changes and identify any further problems that arise?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
40 feel confident to present the problems to others with suggestions for improvement?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Section 5 – Additional Information for Benchmarking

This final section is to enable your assessment to be placed in the larger context of the organisation and will allow comparisons to be made about front line staff delivery and organisational policies and practices. Please choose one or more of the options to represent the practices of your organisation.

5.1. Policy/strategy statements for customer service...

- | | |
|---|--------------------------|
| a. are virtually non-existent | <input type="checkbox"/> |
| b. have been discussed but not in a formal manner | <input type="checkbox"/> |
| c. have been formally documented | <input type="checkbox"/> |
| d. have been communicated to all employees | <input type="checkbox"/> |

5.2. A company training programme in customer service for front line staff...

- | | |
|---|--------------------------|
| a. does not exist on a formal basis | <input type="checkbox"/> |
| b. is driven by request, not by identified business needs | <input type="checkbox"/> |
| c. includes routine assessment of training effectiveness | <input type="checkbox"/> |
| d. includes assessment of competence on the job | <input type="checkbox"/> |

5.3. Personal development needs are identified...

- | | |
|---|--------------------------|
| a. infrequently, or only when there is a problem | <input type="checkbox"/> |
| b. frequently by line managers without the involvement of employees | <input type="checkbox"/> |
| c. regularly by line managers with the involvement of employees | <input type="checkbox"/> |
| d. and used as a career path | <input type="checkbox"/> |

5.4. Performance targets are set...

- | | |
|--|--------------------------|
| a. from overall business objectives | <input type="checkbox"/> |
| b. for workgroups and/or individuals without their involvement | <input type="checkbox"/> |
| c. for workgroups and/or individuals with their involvement | <input type="checkbox"/> |
| d. weekly/monthly/yearly | <input type="checkbox"/> |

5.5. Performance Standards in Customer Service have been developed for...

- | | |
|-------------------------------|--------------------------|
| a. industry performance | <input type="checkbox"/> |
| b. organisational performance | <input type="checkbox"/> |
| c. workgroup performance | <input type="checkbox"/> |
| d. individual performance | <input type="checkbox"/> |

5.6. Retention of customer service staff...

- | | |
|---|--------------------------|
| a. is a major problem in the organisation | <input type="checkbox"/> |
| b. is a minor problem in the organisation | <input type="checkbox"/> |
| c. is not a problem for the organisation | <input type="checkbox"/> |
| d. depends on rewards and recognition | <input type="checkbox"/> |



5.7. Recruitment of suitable customer service staff...

- a. is a major problem for the organisation
- b. is a minor problem in the organisation
- c. is not a problem for the organisation
- d. could become a problem in the future

5.8. Skills shortages for front line staff include..

- a. communication skills
- b. ability to work as part of a team
- c. ability to work under pressure
- d. problem solving
- e. ability to use own initiative
- f. other(s) – please specify below

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Sign-off by CEO or an Executive Director

Name: Position or Title:

Date: Sign-off/ Signature:



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to make good decisions about contact centres"**

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