



Sample Customer Service Assessment Report

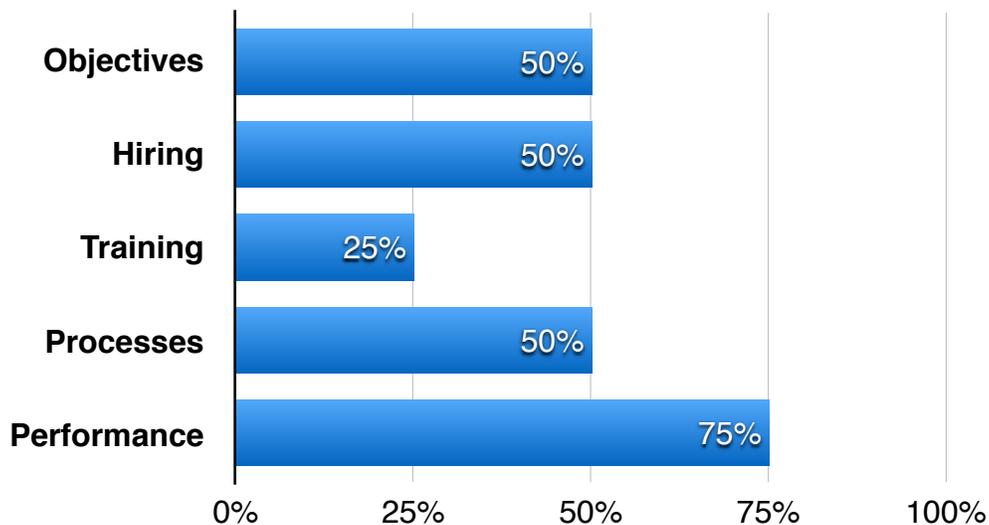
Client: ABC Corporation

Alignment Assessment Summary

Outstanding customer service is possible when an organization aligns its people functions with its customer service vision.

ABC Corporation's alignment score is **50%**, indicating there are strengths in some areas and opportunities for rapid improvement in others.

Alignment Scores By Category



Top Three Recommendations

This report contains detailed recommendations in all categories. Here are the top three areas that can most immediately affect your customer service survey scores.

1. **SMART Goal.** Set a SMART goal for customer service to focus your team on elevating performance. (See page 2)
2. **Training.** Create a performance checklist to help ensure a new hire is fully trained. (See page 4)
3. **Process Design.** Improve processes that generate the most customer dissatisfaction. (See page 5)



Results: Customer Service Objectives

	Points
Customer Service Objectives	
1. Outstanding customer service is clearly defined (i.e. a Customer Service Vision)	5
2. Employees are able to describe the customer service vision.	5
3. Customer service objectives are established and meet the SMART criteria: S = Specific M = Measurable A = Attainable R = Relevant T = Timely	0
4. Employees are aware of progress towards goals (ex: KPIs, etc.)	0
Total Score (20 possible):	10
Alignment:	50%

ABC Corporation has a strong customer service culture that promotes a desire and willingness to service customers at a high level. Employees are consistently able to describe the customer service vision, which is a sign of its true importance. The customer service survey you are now implementing is a great opportunity to benchmark your current service levels and set a goal for continued improvement.

Recommendations:

1. Implement your planned customer service survey and use the results to set a benchmark for your current performance.
2. Use the survey score as a basis for a SMART goal. It is a best practice to include employee input when setting this goal to foster greater buy-in.
3. Communicate this SMART goal to your employees and share regular progress updates.

Resources:

- SMART goal worksheet: www.toistersolutions.com/goals



Results: Employee Selection

	Points
Employee Selection	
1. Job applicants are screened for their ability to relate to and embody the customer service vision.	5
2. An assessment or interviewer other than the hiring manager is utilized to determine each applicant's culture fit	5
3. The knowledge, skills, and abilities a new hire needs to be successful are clearly identified for each position	0
4. Job applicants are screened for the knowledge, skills, and abilities they need to be successful	0
Total Score (20 possible):	10
Alignment:	50%

The employee selection processes are partially aligned with your organizational culture. This indicates you are generally hiring people with the potential to be successful, but there are also opportunities to improve the effectiveness of your selection process.

Recommendations:

1. Update employee job descriptions to incorporate the organization's service vision.
2. Add behavioral interview questions to your selection process so you can better assess applicants' ability to do the job and fulfill the vision.

Resources:

- Competency Model worksheet: www.toistersolutions.com/competency
- *Interviewing by Example*, by Janis P. Whitaker: [Available on amazon.com](http://www.amazon.com)



Results: Training

	Points
Training	
1. The customer service vision is introduced in new hire training	0
2. The customer service standards an employee is expected to follow are clearly defined and trained	5
3. The new hire training program has clearly defined learning objectives that participants must meet to complete the training	0
4. The training design incorporates some form of follow-up after the primary learning event to reinforce learning and ensure the knowledge gained in training is retained	0
Total Score (20 possible):	5
Alignment:	25%

Employee training is not yet aligned with your customer service vision. However, you can rapidly improve alignment and speed up the employee on-boarding process with a few simple steps.

Recommendations:

1. Create a performance checklist to guide employee on-boarding. This is a simple checklist that lists the performance an employee must be able to demonstrate before he/she is fully trained. This tool will ensure more consistent training.
2. Incorporate the customer service vision into new hire training so new employees learn about ABC Corporation’s strong service culture.
2. Set a check-in date to evaluate the training progress of each new hire. A good rule of thumb is to choose a time frame that gives the average new hire enough time to complete training and begin to perform their job independently.

Resources:

- Learning objectives worksheet: www.toistersolutions.com/objectives



Results: Job and Process Design

	Points
Job and Process Design	
1. The responsibilities of each position are clearly aligned with the customer service vision	0
2. Employees can easily access the information, tools, and job aids they need to perform their jobs correctly	5
3. Customer value is a primary driver in the design of processes and procedures	0
4. Employees are consulted when designing processes and procedures to serve customers	5
Total Score (20 possible):	10
Alignment:	50%

Job and process design are partially aligned with your department’s service vision and objectives. You will likely see rapid improvement in this area since you are currently developing many processes and procedures for various departments.

Recommendations:

1. Establish clear links between each position and your customer service objectives. This can be accomplished by updating your employee job descriptions as planned.
2. Review your processes and procedures to ensure they align with ABC Corporation’s customer service vision.

Resources:



Results: Performance Management

		Points
Performance Management		
1.	Employees can demonstrate knowledge and understanding of expected performance	5
2.	Employees are routinely given feedback (both formally and informally) on their performance.	5
3.	Employees are engaged in efforts to continuously improve customer service.	0
4.	Employees are held accountable for their performance	5
Total Score (20 possible):		15
Alignment:		75%

Performance Management is an area of strong alignment for the ABC Corporation. Employees understand what’s expected of them and are routinely given feedback on their performance. They’re also held accountable for the service that they provide.

Engaging employees in efforts to continuously improve customer service will elevate performance even higher. You can use your new customer service survey to facilitate this.

Recommendations

1. Review customer service survey results with employees. Engage them to help solve the biggest challenges identified by the survey.
2. Utilize the Quick Fix Checklist to identify opportunities to rapidly improve performance when you identify areas that are lagging.

Resources:

- Quick Fix Checklist: www.toistersolutions.com/quick