



Management tool #A-2: ©

The 'Service Challenge' Audit Sheet

Business Name:	
Your Name:	
Title / Dept:	

What might be preventing us from delivering extraordinary customer service and experiences?

Failure to deliver extraordinary customer service and experiences is generally caused by some of the underlying factors listed below. Have each leader, manager and supervisor, and 20% of your front-line staff take just 4 minutes to complete this Audit Sheet by putting 'X' in the box beside each item shown below that might need addressing in your business. Analyze the results to look for insights on what needs fixing.

Then, determine what action will be taken, by whom, by when, at what cost, measured how and rewarded how.

Note: Point 16 is specifically for retailers only. All other 'Audit Sheet' points below apply to every type of business.

	1. We lack a real passionate commitment to customers at 'the top' of our organization. We talk about 'service'...but it's mostly just talk.
	2. Negative attitudes about customers that prevail throughout, or in some parts of, our business.
	3. We don't know enough about what our customers really need or want...or how they feel.
	4. We don't provide the coaching that our customers need to wisely choose and effectively use what we sell.
	5. We have no clear and effectively communicated Service Commitment, Service Standards or measurement of service delivery in our business.
	6. Lack of well-communicated standards of appearance, performance and behavior.
	7. We need to create or improve clear processes and systems that create a consistent, stress-free, positive and efficient customer experience.
	8. Poor supervision...ineffective supervisors...or not enough regular supervision.
	9. Not hiring people with the required knowledge, skills and attitudes.
	10. Lack of effective ongoing training re product knowledge, systems or procedures.
	11. We're understaffed.
	12. High staff turnover which results in staff not having the product and customer knowledge they need.
	13. Some of our products or services are not right for our target customers, or don't perform as promised.
	14. Some of our physical facilities, equipment or technology limit our ability to serve wonderfully.
	15. Our sales people or advertising make some promises that we cannot, or do not deliver.
	16. Poor signage, pricing info or store layout confuses and stresses customers. Or our store is 'old' looking.
	17. Our Website is out of date, cluttered or difficult to navigate. Our 'Contact us' info is vague & frustrating.
	18. We don't use Social Media effectively to add value, communicate and create excitement.
	19. Lack of a customer database, or use of it to effectively and proactively serve regular customers as individuals.
	20. Some of our policies frustrate, stress and alienate our customers.
	21. Our staff are not empowered to make decisions that will serve customers quickly and effectively.
	22. Our front-line people know what needs fixing, but management doesn't listen.
	23. Lack of recognition, rewards and appreciation for our front-line service team. They're demoralized ...and it's management's fault.
	24. We don't respond to customer complaints or problems quickly, or honestly.
	25. Some aspect of our pricing, billing or invoicing is unclear, misleading or manipulative.
	26. We don't deal effectively with staff who choose not to deliver our service promise.