



## Customer Experience Performance Evaluation (Professional Services Firm Edition)

The following evaluation form is designed as a simple method to quickly ascertain just how customer focused your business / organisation really is.

*Place a tick in each box where your answer is yes. Total your score and see how your organisation rates.*

1. Do we have a publicly stated Service Charter for our business, outlining key performance indicators in all areas of customer service, including opening hours, customer confidentiality, customer communication, response times, complaints procedures and redress? ☐
2. Are our business trading hours based on what we know best suit our customers needs and wants? ☐
3. Do we have sufficient car-park spaces for our customers and are the ones nearest our front door reserved for customers and not senior management or staff? ☐
4. If we don't have onsite car parking for clients, are we able to provide clear instructions as to where the closest and most convenient public car park is located? ☐
5. Do we have a daily procedure for ensuring that all external areas of our premises, including footpaths and car-parks (where applicable), are kept clean, tidy and free of rubbish at all times? ☐
6. Do we have a 'welcome' sign or doormat at the entrance of our premises? ☐
7. Is there a welcoming 'feel' about the entrance to our business premises? ☐

8. Do we have an aromatherapy oil burner or similar in our reception and client areas with a specifically chosen fragrance to match our business? ☐
9. Is all our directional signage sufficient, clear and located in the best place for our customers to see and read? ☐
10. Does our staff rostering provide for sufficient staff at all times to serve our customers? ☐
11. Do we have back-up systems for peak periods? ☐
12. Are our staff empowered to co-opt additional staff from other departments to assist during peak times? ☐
13. Do we have uniformity in how we greet our customers? ☐
14. Do we have a standard telephone greeting that is used by all staff? ☐
15. Are our staff fully trained in establishing rapport with our customers? ☐
16. Do all staff know the power of a smile; and to stand rather than remaining seated when greeting clients? ☐
17. Do all staff know how to shake hands correctly, to look customers in the eye; and are they pleasant and courteous at all times? ☐
18. Do we address customers on a first-name basis wherever possible? ☐
19. Do we have systems in place to ensure that we pronounce and spell our customers' names correctly? ☐
20. Are all our client information brochures and conversations with customers devoid of industry jargon and legalese? ☐

21. Does our corporate culture insist upon the highest standard of manners at all times? ☐
22. Do we provide our customers a range of beverage options, including juice and water, when offering them a drink? ☐
23. Do we serve our customers proper plunger or espresso coffee and not the cheap instant variety? ☐
24. Do we have a spring-water fountain available for both customers and staff? ☐
25. Have all of our amenities, including furniture, been purposefully selected to comfortably cater for our full range of customers? ☐
26. Are the magazines in our reception area the latest issues and are they in good condition? ☐
27. Do we subscribe to a daily newspaper and two or three different magazines solely for our reception area, and are out-of-date magazines routinely removed? ☐
28. Do we have a system in place for ensuring that pens and other items provided for customer convenience are in good working condition? ☐
29. Do we place fresh flowers in our customer reception area on a regular basis? ☐
30. Do we have a box of toys for the children of our customers in our reception area? ☐
31. Are all our staff fully trained in the use of cash registers, credit card and EFTPOS equipment? ☐
32. Are our staff easily accessible for customers seeking assistance or information. ☐

33. Do we regularly conduct training sessions with our staff regarding new products and services, legislation updates, and other professional matters? ☐
34. How much care and attention do we put into the design of our business cards? Do we have information on the reverse side of our business cards? ☐
35. Do we provide business cards to all staff? If not, why not? ☐
36. Are our information brochures designed with customer 'benefits' as the primary focus, rather than being feature focused? ☐
37. How often do we update our information brochures? Do we print sufficient quantities and are they displayed in professionally designed brochure racks? ☐
38. Do we provide professional uniforms for our staff? ☐
39. Are our staff involved in the design and/or choice of uniform? ☐
40. Do we have explicit dress and grooming standards, plus agreed policies and consequences in place for non-adherence? ☐
41. Do we have creative, easy-to-read name badges for all staff that are to be worn at all times? ☐
42. How is our telephone answered? Do we have a standardised greeting to be used by whoever answers the phone? ☐
43. Do we have human beings answering our phones and not technology creating barriers between us and our customers? ☐
44. What do our customers listen to when they are placed on hold and is the music or message appropriate for our customers? ☐

45. Do we have an effective after-hours telephone answering service and do we have procedures in place to respond to our customers in emergency situations? ☐
46. Do we have a company policy for returning telephone calls? Is this clearly stated in our service charter? ☐
47. Do we have a company policy for responding to emails? Is this clearly stated in our service charter? ☐
48. Does every member of staff have a properly designed email signature containing full contact company contact details? ☐
49. Do we deal with our customers face to face wherever possible? ☐
50. Do we have daily dusting and vacuum rituals and is the cleanliness of our working environment a top priority? ☐
51. Are our public toilets kept in immaculate condition at all times? ☐
52. Do all of our air fresheners incorporate our chosen corporate fragrance? ☐
53. Are our staff toilets and lunchrooms kept in immaculate condition? ☐
54. Do we have clearly stated safety policies and do we constantly communicate the importance of safety to all our staff? ☐
55. Do we have background music for our staff and customers and are the type of music and volume level appropriate? ☐
56. Are the pictures and posters that hang on our walls appropriate? ☐
57. What is the temperature setting for our premises? Is it suitable for the nature of our business? ☐

58. Do we have a clearly communicated 'team code of conduct'? ☐
59. Were staff involved in establishing the code and do we have agreed consequences in place for non-adherence? ☐
60. Do we have internal communication systems and procedures in place to keep everyone informed on all aspects of company developments and performance? ☐
61. Do we know that our internal communication systems are effective? ☐
62. Do we have a regular staff newsletter or communiqué? ☐
63. Do we celebrate staff birthdays? ☐
64. Would giving staff the day off be a suitable gift from the company? ☐
65. Do senior management regularly 'mingle with the troops'?  
(Management by walking around). ☐
66. Does everybody know and refer to everyone else in the company by name? (Preferably by first name). ☐
67. Do senior management have lunch with everyone else rather than in executive lunchrooms? ☐
68. Does our culture allow for people to have fun at work including items of a purely spontaneous nature? ☐
69. Do we recognise employees who have gone beyond the call of duty or who have achieved success in some form of business or personal endeavour? ☐
70. Do we have monthly rituals in terms of special events such as 'free dress' days, barbecues, movie outings, family picnics, and so on? ☐

71. Do we have a staff notice board? ☐
72. Do we have a staff suggestion box? ☐
73. Do we have an electronic version or an alternative system for capturing suggestions and input from staff? ☐
74. Does our culture actively encourage contributions from staff to help make our business more successful ☐
75. Do we have regular events involving partners and families such as an end-of-year staff family picnic or end-of-financial-year dinner for staff? ☐
76. Do we support particular charities? ☐
77. Do we as a team support annual charity events such as the Red Shield Appeal for the Salvation Army, or Royal Flying Doctor Fundraisers? ☐
78. Does our company have an environmental 'conscience'? ☐
79. Is our commitment to 'green' policies clearly stated in our customer charter? ☐
80. What is our commitment to staff training and ongoing professional development? Do all our staff from CEO to office junior participate in annual customer experience training? ☐
81. Do we instigate an annual training-needs analysis to ascertain training requirements for all of our staff? ☐
82. Do we hold regular team meetings? (Preferably weekly). ☐
83. Do we conduct 'futurestorming' sessions every 90 days to generate new and better ways of growing our business? ☐

84. Who facilitates these meetings? Would engaging the services of an external facilitator be a good idea? ☐
85. Do we regularly conduct customer focus groups? ☐
86. Do we regularly conduct staff focus groups? ☐
87. Do we conduct customer surveys? ☐
88. Do we have systems in place to regularly 'benchmark' competitor activities and other industry innovations? ☐
89. Do we have a customer-friendly, easy-to-navigate website? ☐
90. Do we have simple forms and procedures within our organisation? ☐
91. Do we constantly strive to reduce bureaucracy at all levels? ☐
92. Do we have systems and procedures in place that afford maximum client confidentiality at all times? ☐
93. Do we have a range of communication channels for our customers? ☐
94. Do our customers know what those communication channel options are? ☐
95. Do we have a complete range of payment options for our customers? ☐
96. Do we accept all credit cards and have EFTPOS available? ☐
97. Are our customers aware of those options? ☐
98. Do we have a policy and schedule for keeping in touch with our customers? ☐



99. Do we ensure that we are in touch with our customers every 90 days? ☐
100. Do we place a priority on ensuring our customer database is kept current and accurate at all times? ☐
101. Do we have a monthly customer newsletter? ☐
102. Do we have specially printed 'thank-you' cards? ☐
103. Do we use these on a regular basis throughout our organisation? ☐
104. Do we send out specially printed birthday and festive cards to our customers featuring our logo? ☐
105. Do we have procedures in place to ensure that our company vehicles are kept in immaculate condition at all times? ☐
106. Do we provide advanced driving lessons for our staff? ☐
107. Do we encourage and/or reward courteous and responsible driving? ☐
108. Are all our company vehicles appropriately sign-written, showing what we do in conjunction with who we are? ☐
109. Do we have a culture of honesty where telling the truth is totally non-negotiable? ☐
110. Is punctuality one of our most revered values? ☐
111. Do we ensure that all members of staff understand the importance of always being on time? ☐
112. Do we make and keep specific appointment times with our customers? ☐

113. Do we have publicly stated 'on-time' guarantees and are they clearly stated in our service charter? ☐
114. Do we consciously keep our letters and documentation as short as possible? ☐
115. Do we have clear remedies in place to appease aggrieved clients. ☐
116. Are they clearly stated in our service charter? ☐
117. Do we place a priority on responding to our clients needs as quickly as is professionally possible? ☐
118. Are we constantly looking for and generating new ways of adding value for our customers? ☐
119. Where appropriate, do we supply umbrellas for use by our customers in inclement weather? ☐
120. Do we assist customers by carrying files, packages etc. out to their vehicles for them? ☐
121. Do we have a clearly thought-out customer complaints process? ☐
122. Do we have a complaints register that is regularly monitored to identify areas of improvement in our service delivery systems and procedures? ☐
123. Do we have a policy of always exceeding our customers' expectations? ☐
124. Do all our staff know that they are always on duty and do they understand and appreciate that their behavior, both on and off the job, reflects on the reputation of this organisation? ☐
125. Do we have a procedure in place to secure a constant flow of referrals from our existing customers? ☐

126. Do we regularly obtain testimonial letters from delighted clients? ☐
127. Does our organisation have a reputation as being a great place to work? ☐
128. Do we apply as much attention to serving our internal customers as we do for our external clients? ☐
129. Do we show our appreciation to both our internal and external customers? ☐
130. Is our organisation renowned for its culture of customer service excellence? ☐

*Add up the total number of ticks.* ...../130

### **What your score means:**

- 0–26      Your organisation is likely stuck in an industrial-age time warp. Customer service may be talked about; however there is little evidence to demonstrate that you are really serious about implementing it. Good luck for the future, you will need it.
- 27–52      While there are signs that certain aspects of customer service are being implemented, it's time to shift into a higher gear by focusing on delivering far greater service to both your internal and external customers. Your future will depend on it.
- 53–78      Average equals best of the worst. You are definitely heading in the right direction, but you still have a long way to go to match those organisations achieving world's best practice in customer experience excellence.
- 79–104      Well done ... so far. Customer service is obviously a priority at your place of business, but there is still plenty of room for improvement if you are serious about becoming an industry leader. Keep up the good work.
- 105–130      Congratulations! Hopefully you and your team are enjoying the fruits of delivering service excellence, however there's no time to be complacent. Your competitors are most likely benchmarking your service standards as we speak. Remember that today's laurels are tomorrow's compost.



Professional Speaker, Marketing Futurist and Business Coach **Graham Harvey** is the bestselling author of ***Seducing the Vigilante Customer: 101 winning strategies to attract and retain happy customers and healthy profits***. He is recognised as one of Australasia's foremost thought leaders on Customer Experience and Relationship Marketing, and in 1999 was awarded Western Australian Professional Speaker of the Year.

Commencing his business consultancy in 1986, he continues to work throughout the Asia Pacific region guiding organisations and coaching individuals on growing their business by achieving greater clarity of future, and developing innovative customer experience and customer relationship management and marketing strategies.

With a passion for researching global business trends and an ability to convey the complex in simple terms, Graham is a dynamic speaker whose personal mission is to challenge, inspire and empower individuals and organisations to design, develop and grow futures of greatness through vision, innovation and service.

In 2006, Graham and his wife made a sea change to Albany on Western Australia's beautiful south coast where he continues to live and base his business activities.

He is currently completing his new book ***Design! Deliver! Delight! – winning strategies to develop a great customer experience and a culture of service excellence***.

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