# Customer Experience Organizational Assessment

By Rick Conlow & Doug Watsabaugh

RICK CONLOW INTERNATIONAL

WCW partners

Copyright © 2012, 2025 update. WCW Partners, Inc. AND Rick Conlow International. St. Paul/Minneapolis, MN USA
Not for reproduction in any form without permission. Reproductions must include this copyright page.

Published by

WCW PARTNERS, INC and RICK CONLOW INTERNATIONAL

# Customer Service Excellence Organizational Assessment

The purpose of this assessment is to give you an opportunity to review your current service practices for your organization. Using the scale below, determine to what degree this organization performs the stated task and write your answer in the blank provided to the left of each item.

**Scale:**

6 - To a very great degree
5 - To a great degree
4 - To some degree
3 - To a little degree
2 - To a very
1 - Not at all

**To What Degree:**

1. _____ ...does this organization effectively plan for the development of long-term customer service excellence?

2. _____ ...does this organization project a willingness to help customers?

3. _____ ...do the leaders of this organization regularly encourage employees to share best practices in customer service?

4. _____ ...does this organization continuously strive to improve its customer service standards?

5. _____ ...does this organization utilize independent surveys to track the level of satisfaction of its customers?

6. _____ ...does the senior leadership of this organization maintain close and direct contact with customers?

7. _____ ...do the leaders of this organization conduct frequent training sessions in using customer service tools?

8. _____ ...does this organization continuously improve its methods for determining customer satisfaction?

9. _____ ...does this organization have standards that govern interactions between its employees and customers?

10 _____ ...do the leaders in this organization encourage employees to continuously share ideas for your customer service plans?

11 _____ ...does this organization's leadership consistently demonstrate passion and enthusiasm about customer service?

12 _____ ...does this organization have effective procedures for handling customer problems and complaints?

© 2012, 2025 update WCW Partners and Rick Conlow International

**Scale:**

6 - To a very great degree
5 - To a great degree
4 - To some degree
3 - To a little degree
2 - To a very
1 - Not at all

**To What Degree:**

13. ____ ...does this organization treat customer-contact personnel as "valued employees"?

14 ____ ...does this organization use the results of customer feedback to improve the quality of its customer service?

15. ____ ...are front line employees empowered to resolve customer complaints?

16 ____ ...does this organization provide learning opportunities specific to individual employees' development opportunities?

17 ____ ...do the top leaders in this organization persistently search for effective approaches to overcome organizational barriers to excellence in customer service?

18 ____ ...does the leadership of this organization "keep score" on things that really make a difference to customers?

19 ____ ...does this organization consistently rank "near the top" for customer satisfaction in ratings by credible independent organizations?

20 ____ ...do front line supervisors in this organization encourage your employees to Greet, Help and Thank all customers?

21 ____ ...does this organization ensure that all employees possess the necessary skills to serve customers effectively?

22. ____ ...does this organization routinely publicize customer satisfaction results for its employees?

23. ____ ...does this organization respond to customer complaints effectively?

24 ____ ...does this organization frequently recognize employees for providing excellent customer service?

25 ____ ...does the leadership of this organization regularly review organizational performance to identify appropriate strategies for customer service improvement?

26 ____ ...is the leadership of this organization regularly on the sales floor coaching employees in customer service skills?

27 ____ ...do you have confidence in the reliability of the data collected on customer satisfaction in this organization?

© 2012, 2025 update WCW Partners and Rick Conlow International

**Scale:**

6 - To a very great degree
5 - To a great degree
4 - To some degree
3 - To a little degree
2 - To a very
1 - Not at all

**To What Degree:**

28 ____ ...do the leaders in this organization consistently praise employees for meeting or exceeding customer service expectations?

29. ____ ...does this organization use customer service standards to guide leadership communications?

30 ____ ...are all managers in this organization relentlessly encouraged to execute plans and actions to improve customer service?

31 ____ ...do the leaders of this organization consistently follow-up on customer feedback, both positive and negative?

32 ____ ...do the managers in this organization consistently look for opportunities to tell employees how they are performing against customer service expectations?

33. ____ ...does this organization emphasize error-free service to customers?

34. ____ ...does the leadership of this organization continuously search for new ways to "refresh" the message about the importance of customer service?

35. ____ ...do the leaders of this organization consistently work at improving service to its customers?

36 ____ ...do the managers of this organization clearly communicate customer service standards and expectations for new hires?

37 ____ ...are all managers in this organization encouraged to quickly address performance or actions that are inconsistent with the goal to satisfy every customer?

38 ____ ...do the leaders in this organization spend time recognizing good customer service performance?

39 ____ ...do the leaders of this organization routinely ask employees for ideas on how you can improve customer service?

40 ____ ...does the leadership of this organization regularly review its performance in search of new opportunities to improve its customer service?

41 ____ ...is the leadership of this organization regularly on the sales floor modeling effective customer service?

42. ____ ...do the leaders in this organization consistently model customer service best practices?

43 ____ ...do the managers in this organization regularly share your customer Service scores with your employees?

© 2012, 2025 update WCW Partners and Rick Conlow International

**Scale:**

6 - To a very great degree
5 - To a great degree
4 - To some degree
3 - To a little degree
2 - To a very
1 - Not at all

**To What Degree:**

44 ____ ...does the leadership of this organization use recognition as a tool to continuously reinforce the importance of excellence in customer service?

45. ____ ...do the leaders in this organization execute your customer service plan consistently?

46 ____ ...do the leaders in this organization hold regular employee meetings to discuss customer service?

47 ____ ...do the managers in this organization spend time each day redirecting employee behavior not consistent with your customer service plan?

48. ____ ...do the leaders in this organization execute your customer service plan effectively?

49 ____ ...does the leadership of this organization strive to set up "meaningful" rewards and recognition to demonstrate the value the organization places on excellence in customer service?

50 ____ ...do the leaders of this organization spend time understanding the unique development needs of your employees?

51 ____ ...does this organization systematically follow up customer service training to ensure that it "sticks" and that it is utilized consistently?

52 ____ ...do the leaders in this organization encourage employees to be innovative in creating new ways to delight customers?

53 ____ ...does this organization routinely celebrate your employee's successes in providing good customer service?

54 ____ ...does this organization encourage customers to share feedback regarding our customer service practices?

55 ____ ...does the leadership of this organization relentlessly communicate that customer service is the top priority for every person in the organization?

56 ____ ...do the leaders of this organization consistently reinforce customer service practices at communication meetings?

57 ____ ...are the managers in this organization trained to consistently address substandard performance with positive encouragement to change?

58 ____ ...does the leadership of this organization convert customer requirements into performance indicators and measures?

© 2012, 2025 update WCW Partners and Rick Conlow International

**Scale:**

6 - To a very great degree
5 - To a great degree
4 - To some degree
3 - To a little degree
2 - To a very
1 - Not at all

**To What Degree:**

59 ____ ...does the leadership of this organization go out of its way to find new opportunities to demonstrate the value the organization places on providing excellent service for every customer?

60 ____ ...does this organization train and empower employees to effectively handle customer complaints?

61 ____ ...do the managers of this organization constantly search for innovative ways to provide excellence in service for our customers?

© 2012, 2025 update WCW Partners and Rick Conlow International

# Scoring

Transfer your scores from the questionnaire into the columns below, taking care to insert the score from each question into the properly labeled cell. Once all scores are inserted, add the scores for each column and enter the total at the bottom of each column.

| Plan | Train | Coach | Renew |
|---|---|---|---|
| 1.____ | 3.____ | 2.____ | 4.____ |
| 5.____ | 7.____ | 6.____ | 8.____ |
| 9.____ | 11.____ | 10.____ | 12.____ |
| 14.____ | 15.____ | 13.____ | 17.____ |
| 18.____ | 21.____ | 16.____ | 19.____ |
| 22.____ | 26.____ | 20.____ | 23.____ |
| 25.____ | 33.____ | 24.____ | 27.____ |
| 29.____ | 36.____ | 28.____ | 30.____ |
| 31.____ | 41.____ | 32.____ | 34.____ |
| 35.____ | 46.____ | 38.____ | 37.____ |
| 39.____ | 51.____ | 42.____ | 40.____ |
| 43.____ | 56.____ | 47.____ | 44.____ |
| 45.____ | 60.____ | 53.____ | 49.____ |
| 48.____ | | 55.____ | 52.____ |
| 50.____ | | 57.____ | 59.____ |
| 54.____ | | | 61.____ |
| 58.____ | | | |
| Total _____ | Total_____ | Total_____ | Total_____ |

© 2012, 2025 update WCW Partners and Rick Conlow International

# Scoring & Interpretation

| Customer Excellence Dimension | Score | Interpretation - ✓ |
|---|---|---|
| **Plan** - Engage in focused planning at regular intervals to build clarity of direction and expectation. Execute your plans rigorously and flawlessly. Track and communicate results. Model and reward key customer service behavior. Maintain a customer focus and continuously improve actions and results. | 85-102<br>68-84<br>51-67<br>17-50 | ☐ - High Propensity for Success<br>☐ - Development Recommended<br>☐ - Area that Need Immediate Work<br>☐ - Success Unlikely without Development |
| **TraIn** – Train all employees to provide the full cycle of customer engagement with excellence. Use a variety of training tools and methodologies to provide needed knowledge, skill, reinforcement and support for ongoing development. Training begins with "on-boarding" and continues as needed to support additional service, product and organizational needs and changes. | 65-78<br>52-64<br>39-51<br>13-38 | ☐ - High Propensity for Success<br>☐ - Development Recommended<br>☐ - Area that Need Immediate Work<br>☐ - Success Unlikely without Development |
| **CoaCh** - Coaching towards higher performance in Customer Service Excellence. Routinely spending time upfront and on the sales floor to "model the way" by greeting customers and providing remarkable customer service. Praising for providing excellent customer service behavior and redirecting inadequate or ineffective customer-service performance. | 70-84<br>56-69<br>42-55<br>14 - 41 | ☐ - High Propensity for Success<br>☐ - Development Recommended<br>☐ - Area that Need Immediate Work<br>☐ - Success Unlikely without Development |
| **rEnEw** - Consistently demonstrating a passion for Excellent Customer Service, putting forth best effort, encouraging and acting on customer and employee input, and passionately emphasizing being the best service provider. Routinely following-up on complaints and regularly celebrating successes in providing excellent service. | 85-102<br>68-84<br>51-67<br>17-50 | ☐ - High Propensity for Success<br>☐ - Development Recommended<br>☐ - Area that Need Immediate Work<br>☐ - Success Unlikely without Development |

© 2012, 2025 update WCW Partners and Rick Conlow International

# Action Planning

## Improving Your Organization's Customer Service

**Instructions**. Use this section to work out a plan for taking action to increase the customer service of your organization. If you are doing this planning task as a group, develop consensus on each item below before recording it on the page.

1. Looking at your Scores on Page 8. In which area or areas were there indications of greater needs for development?

2. What are the payoffs for improving the organization in these areas?

3. Review your scores on pages 3-7 (The Questionnaire itself). Identify any items that you rated 3 or lower. Circle these item numbers.

© 2012, 2025 update WCW Partners and Rick Conlow International

4. Study the items whose numbers you circled in the questionnaire. Look for key themes or organizational characteristics you might consider for improvement.

5. From the Four Customer Service Dimensions outlined and defined on page 9, select one or more dimensions that you believe would lead to improvement of the organization's customer service with focused effort and change. For each action that you concentrate on, make a thorough implementation plan. Consider these questions:

   What specifically will be done?

   Who (especially you) will take action?

   When will you take action and expect results?

   Where will the action take place?

   Why will you employ this approach, for what desired outcomes?

   How much do you expect to achieve as a result of the action?

Remember that action planning is incomplete unless it includes a system of measuring progress against goals. Repeat these steps for each dimension of the Customer Service Organizational Assessment in which there lower ratings. Improving the organizations Customer Service Capability is an investment in staying ahead of the curve. It can mean faster response to shifting customer expectations, a more energized workplace, and better long-term financial viability.

© 2012, 2025 update WCW Partners and Rick Conlow International

## Rick Conlow and Doug Watsabaugh

Rick Conlow, CEO/Senior Partner, and Doug Watsabaugh, COO/Senior Partner, have helped companies, governmental agencies and nonprofit organizations achieve record-breaking results for more than 20 years as performance improvement experts. Their clients' achievements include eNPS ratings 50-84%, NPS ratings 50-95%, double-digit improvement in repeat and referral business, triple-digit increases in sales, more than 50% reduction in customer complaints, 48 quality and service awards, and domination in their respective markets.

Rick and Doug are popular motivators and speakers, inspiring audiences with their engaging down-to-earth but down-to-business approach. They have authored more than a dozen books, including *SuperSTAR Customer Service* and *The SuperSTAR Leadership Model.*

Rick Conlow International is a performance improvement com- pany. Based in Minneapolis, Minnesota, we work with clients in a variety of industries worldwide to help them excel in sales, service and leadership. We facilitate business growth and vitality through four practices – sales and customer retention improvement, elevating people first through Servant leadership, innovation and communications strategy. ***You are capable of amazing things. Partner with us today!***

# CONTACT US:

**www.rickconlow.com**

**612-868-8521**

**CONTACT RCI**

© 2012, 2025 update WCW Partners and Rick Conlow International