



Your Service Culture Guide

## Sample Service Culture Assessment Report

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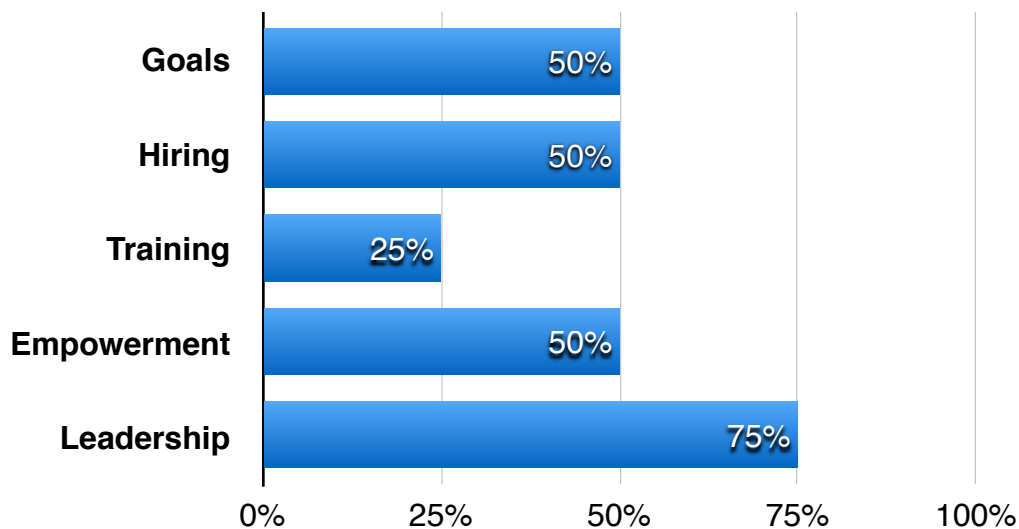
Client: ABC Corporation

### Summary

A customer-obsessed culture 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

These actions can have the biggest impact on ABC Corporation's service culture:

1. **Goals.** Implement the planned update to the customer service survey and use the results to continuously improve performance. (See page 2)
2. **Training.** Create a performance checklist to help ensure a new hire is fully trained. (See page 4)
3. **Empowerment.** Improve the knowledge base so employees can quickly access accurate product information. (See page 5)

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Results: Goals

Goals	Points
Customer service objectives are established and meet the SMART criteria: <b>S</b> = Specific <b>M</b> = Measurable <b>A</b> = Attainable <b>R</b> = Relevant <b>T</b> = Timely	5
Primary goals are set that meet the Good Goal criteria: <ul style="list-style-type: none"> <li>• Focus attention on the customer service vision</li> <li>• Reward teamwork</li> <li>• Rely on intrinsic motivation</li> </ul>	0
Employees are aware of the customer service goals.	5
Employees know how their current performance compares to customer service goals.	0
<b>Total Score (20 possible):</b>	<b>10</b>
<b>Alignment:</b>	<b>50%</b>

ABC Corporation has a strong customer service culture that promotes a desire and willingness to service customers at a high level. Employees are generally aware of their individual customer service goals, though the focus on individual incentives inhibits teamwork. Employees are also not aware of the team's progress towards key goals.

**Recommendations:**

1. Implement the planned update to the customer service survey and use the results to continuously improve performance.
2. Use the survey score as a basis for a team goal that meets the [good goal criteria](#). A team-focused goal (rather than an individual one) will generate more cooperation.
3. Add service updates to the existing weekly meetings. Leaders should discuss current survey trends (positive and negative) and engage employees in deciding how to quickly improve upon negative issues.

**Resources:**

- Learn more about goal-setting: [www.toistersolutions.com/goals](http://www.toistersolutions.com/goals)
- Learn more about effective survey design: [www.toistersolutions.com/surveys](http://www.toistersolutions.com/surveys)

## Results: Hiring

	Points
<b>Employee Selection</b>	
The characteristics of an employee who fits the culture are clearly identified.	0
Job applicants are screened for their ability to embody the customer service vision.	0
The knowledge, skills, and abilities a new hire needs to be successful are clearly identified for each position.	5
Job applicants are screened for the knowledge, skills, and abilities they need to be successful.	5
<b>Total Score (20 possible):</b>	<b>10</b>
<b>Alignment:</b>	<b>50%</b>

The existing hiring process does a good job of screening applicants for the required skills. The next step is to add a process to screen applicants for culture fit.

### **Recommendations:**

1. Update employee job descriptions to incorporate the organization's service vision.
2. Create an [ideal candidate profile](#) that describes your must-have characteristics for culture fit.
3. Add behavioral interview questions to your selection process so you can better assess applicants' ability to do the job and fulfill the vision.

### **Resources:**

- Ideal Candidate Profile worksheet: [www.toistersolutions.com/profile](http://www.toistersolutions.com/profile)
- *Interviewing by Example*, by Janis P. Whitaker: [Available on amazon.com](http://Available on amazon.com)



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**Results: Training**

	Points
<b>Training</b>	
The customer service vision is introduced in new hire training	5
The new hire training program has clearly defined learning objectives that participants must meet to complete the training.	0
Employees are assessed for their ability to answer these questions: 1. What is the customer service vision? 2. What does it mean? 3. How do I personally contribute?	0
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
<b>Total Score (20 possible):</b>	<b>5</b>
<b>Alignment:</b>	<b>25%</b>

The customer service vision is discussed in new hire training, which is a good first step. New hire training can be further improved by ensuring new hires understand, retain, and remember the skills and behaviors they need to align with the service culture.

**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. Add an assessment that tests new hires' ability to answer the three questions (see results table above). This will help confirm their understanding of the culture.
3. 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](http://www.toistersolutions.com/objectives)



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Results: Empowerment

	Points
<b>Job and Process Design</b>	
Employees have the tools, resources, and equipment they need to deliver the customer service vision.	0
Clearly defined standard operating procedures are in place to help employees deliver the customer service vision.	0
Employees are given the authority necessary to consistently deliver the customer service vision.	5
Employees are regularly consulted to solve problems that prevent outstanding service.	5
<b>Total Score (20 possible):</b>	<b>10</b>
<b>Alignment:</b>	<b>50%</b>

Employees are frequently involved with problem-solving. This promotes more creative solutions and a higher degree of ownership. Employees are generally given wide latitude to do what it takes to help a customer. Empowerment can be further improved by establishing more set procedures so each person can consistently follow the same process (this will improve training, too). Employees are also lacking some of the tools they need to do their job, such as an up-to-date product knowledge base.

**Recommendations:**

1. Create a cross-functional task force to update and maintain the product knowledge base so all employees have fast access to the correct information. This task force should create procedures for ongoing maintenance.
2. Establish set procedures for the most common work tasks:

Step	Action
1	Identify common tasks where procedures are unclear.
2	Enlist seasoned employees to help write simple procedures.
3	Test procedures by having newer employees try to follow them.

**Resources:**

- See Chapter 9 in [The Service Culture Handbook](#).

## Results: Leadership

	Points
<b>Performance Management</b>	
Leaders consistently model the customer service vision.	5
Leaders can give consistent answer to these three questions: 1. What is the customer service vision? 2. What does it mean? 3. How do I personally contribute?	5
The customer service vision is used to guide decision-making.	0
A communication plan exists to consistently reinforce the customer service vision.	5
<b>Total Score (20 possible):</b>	<b>15</b>
<b>Alignment:</b>	<b>75%</b>

Leaders do an excellent job of modeling the customer service vision and display a clear understanding of its meaning. There is also a good communication plan to reinforce the customer service vision on a regular basis. The next step is to use the customer service vision as a guide for making key decisions. For example:

- Annual strategic planning
- Developing policies and procedures
- Designing coaching and feedback processes

### **Recommendations**

1. Review the existing strategic plan for alignment with the customer service vision.
2. Utilize the Quick Fix Checklist to identify opportunities to rapidly improve team performance when you identify areas that are lagging.

### **Resources:**

- Quick Fix Checklist: [www.toistersolutions.com/quick](http://www.toistersolutions.com/quick)