

14 POINT CHECKLIST

BUILDING EXCELLENCE FRAMEWORK

This 14-point checklist is designed to help organizations discover both their strengths and opportunities for growth around their customer and employee experiences.

1. KNOW YOUR CUSTOMER

Do you know your customer, their needs and wants? Do you use surveys? When sentiments are discovered, do you adapt?



2. SERVICE PROCESS

Do you have a replicable process that serves as the standard for your employees?



3. SUPREME OBJECTIVES

Can your employees recite your three or four most important business objectives?



4. HANDLING COMPLAINTS

Are your employees trained and equipped to handle simple and complex complaints from customers?



5. CUSTOMER TYPES

Does your team understand the important differences between satisfied, dissatisfied, and loyal customers?



6. PEOPLE SELECTION

Do you have the right people selected for your roles? Have you offered them inspiring purpose?



7. ORIENTATION | ONBOARDING

Does your onboarding, orientation, and training processes communicate your company purpose before job functions?



8. SYSTEMS OF REPETITION

Have you created systems that cause important values and behaviors to be repeated daily?



9. LEADERS LEADING

Do you have leaders in the organization, not managers, inspiring employees with motivation and purpose?



10. BRIDGING THE ORG. GAP

Do leaders and employees have rapport, connection, and a culture of trust?



11. DEVELOPING LEADERS

Are leaders growing in personal and professional confidence to make strong decisions for the organization?



12. VISION MATTERS

Do you have a compelling destination in mind for your company? Is it good for all involved?



13. PICKING THE RIGHT METRICS

Does your team have a firm grasp on the most helpful metrics to measure progress and success? Is your team capturing the right data to produce the insights?



14. TIE IT TOGETHER

Have you developed a cohesive strategy, from customer experience, employee care, and product and service user experience that expresses one, cohesive brand?

