Customer Service Audit Checklist

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To be clear, a customer service audit is not meant to point the finger of blame at one department or another. It is meant to be used as an organizational tool to identify current state gaps and become the catalyst that organizations need to drive strategic, long-lasting change.

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EXPERT GUIDANCE • PROVEN RESULTS

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At the heart of every engagement with CH Consulting Group is a comprehensive discovery process. We start every project we work on with our 360° View Assessment (LITE version also available), where we use a customer-centric approach that thoroughly reviews current people, processes, and technology. We review how your current state is functioning and how it impacts the Customer Experience. From there, we design a strategy that bridges the gap between current state and an optimized future state.

See below for a high-level list of questions that would help kick off a Customer Service Audit – feel free to use this as an internal starting point within your organization!

⊠ PEOPLE
☐ How often do you provide your agents with one-on-one coaching?
☐ How often do you conduct staff meetings to discuss customer service trends?
☐ How long is the on-boarding training for new agents? What does it entail?
☐ What communication channels are given to your agents to voice their feedback, concerns, etc?
☐ How often do you conduct refresher training? For agents? Supervisors?
☐ What is your turnover rate?
☐ Do you utilize a direct-hire, temporary hire, or hybrid agent model?
☐ Are your agents and supervisors provided with a clear, concise job description that details their responsibilities?
☐ Are your agents and supervisors able to articulate what their roles are in delivering customer service for your company as well as their day-to-day responsibilities?
☐ Are your agents empowered to make decisions for customers and possibly "bend the rules" as needed, or are calls escalated to accommodate any rule-breaking scenario?

⊠ PROCESS
☐ Do you have any manual processes? If so, what are they?
☐ Do you have any automated processes? If so, what are they?
☐ Do you have a documented customer service policy? Is it shared with your entire company and your customers?

☐ How are service policies communicated to your customers? Ex. website, e-mail?

☐ Do you have a documented escalation policy?

☐ Do you have a documented set of Quality Assurance guidelines? Is it shared with your entire company?

☐ How are complaints monitored, tracked, and followed up on?

☐ What metrics are you currently tracking and what are your current service goals? Do you find these goals are difficult to meet?

☐ Do you have documented call flows and diagrams?

☐ Do you currently have a documented customer feedback program in place?

☐ How are changes to policies communicated to staff?

☐ How often are your policies reviewed and revised?

☐ What internal and external benchmarking, if any, do you have in place?

✉ TECHNOLOGY

☐ What channels are available for customer support?

☐ What levels of reporting are available? Who is the reporting shared with and how often is it shared?

☐ What technology are you currently using to manage and tracking service requests/customer service issues?

☐ Does your technology provider assist you with compliance with state and federal laws?

☐ What technologies do you have in place that support automation?

☐ How long have you had your current technology solutions and when was the last time you considered new solutions?

☐ Do you currently have gamification technology in place?

CH Consulting Group helps contact centers and BPOs across the world by optimizing their contact center operations, technology, sales and marketing. We are unique in our strategically ROI-focused approach where we are not just your consultants – we are your business partners, invested in YOUR success. If you believe it's time to run a customer service audit for your contact center, we would love to help! Give me a call at 218-286-4006 or e-mail me at christah@thechcg.com so that I can have a chance to learn more about your unique needs!