

CUSTOMER SERVICE TEAM FITNESS TEST

LIVING SMALLER
SMARTER

Rate the following questions using this scale

1. STRONGLY AGREE	2. AGREE	3. NEUTRAL	4. DISAGREE	5. STRONGLY DISAGREE
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PHONE SERVICE

- _____ 1. We answer the phone in less than two rings
- _____ 2. We set the tone for the call by introducing ourselves and our office in an upbeat manner
- _____ 3. We “monogram the call” – use the customer’s name throughout the call
- _____ 4. We transfer callers only one time, with ease
- _____ 5. We use warm transfers – letting the call recipient know who is on the phone and why they are calling

OFFICE VISITS

- _____ 1. We greet every person that walks in with a smile and an introduction
- _____ 2. Office visits follow a planned process, including check-in, initial greeting, meeting and follow-up
- _____ 3. We have processes in place to handle visitors when the office gets busy
- _____ 4. We are cross-trained effectively to share information relating to other departments
- _____ 5. Our in-person service is exceptional

EMPATHY

- _____ 1. We are regularly discuss strategies to be more empathetic to stakeholder needs
- _____ 2. We are intentional about showing stakeholders we care about their problem
- _____ 3. We practice active listening techniques to better our service skills
- _____ 4. We ask clarifying questions to make sure we understand the problem
- _____ 5. We are intentional about empathizing with the student

PROCESSES

- _____ 1. We actively revisit processes to make them more customer friendly
- _____ 2. We have a feedback process in place that allows stakeholders to share information about our processes
- _____ 3. We consider the student first in all new processes we develop
- _____ 4. We ask our stake holders to review our processes and give feedback
- _____ 5. We work to make processes between our depart and others student friendly

One customer service technique we do exceptionally well is

One customer service technique we wish we were better at is

