



Customer Service Self-Assessment

If you were your own customer, would you come back?

Purpose: Take an honest look at the customer experience your business delivers, especially when you are not present. Rate what customers consistently experience today, not what you intend for them to experience.

Rating Scale

1	2	3	4	5
Rarely true	Occasionally true	Sometimes true	Usually true	Consistently true

Business: _____ Completed by: _____ Date: _____

1. Customer experience without the owner

Customers receive the same warm, professional, and helpful experience whether or not I am personally present.

Circle one: 1 2 3 4 5

Score: _____

2. Clear service expectations

My team knows the specific behaviors and service standards expected at each stage of the customer journey.

Circle one: 1 2 3 4 5

Score: _____

3. Handling upset customers

When a customer is disappointed or upset, team members know how to listen, respond, and take appropriate action without guessing.

Circle one: 1 2 3 4 5

Score: _____

4. Ownership and follow-through

Customer concerns are owned through resolution, with timely follow-up and no unnecessary handoffs or blame.

Circle one: 1 2 3 4 5

Score: _____

5. Consistency across touchpoints

Our phone, online, in-person, and follow-up experiences reflect the same level of care.

Circle one: 1 2 3 4 5

Score: ____

6. Listening and learning

We actively invite feedback and use what customers tell us to improve our service.

Circle one: 1 2 3 4 5

Score: ____

7. Personalization and respect

Customers feel recognized, respected, and treated as individuals rather than transactions.

Circle one: 1 2 3 4 5

Score: ____

8. Team confidence and support

Employees have the training, tools, authority, and coaching needed to make sound service decisions.

Circle one: 1 2 3 4 5

Score: ____

9. Reasons to return

We intentionally create value, ease, or care that gives customers a meaningful reason to choose us again.

Circle one: 1 2 3 4 5

Score: ____

10. Reasons to recommend

Our customer experience is strong and distinctive enough that customers can recommend us with confidence.

Circle one: 1 2 3 4 5

Score: ____

Your Results

Total score: _____ / 50 Lowest-rated question(s): _____

42-50	Service is a clear strength. Protect what works, recognize the team behaviors driving results, and make excellence repeatable.
33-41	A solid foundation is in place, with a few gaps that may create an uneven experience. Prioritize the lowest-rated areas.
24-32	Customers may experience inconsistency. Focus on clearer expectations, practical response tools, and regular coaching.
10-23	Immediate attention is recommended. Define the desired experience and equip the team to deliver it consistently.

Reflection and Next Step

Where does your team shine?

Which one or two gaps could most affect whether a customer returns?

What is one service behavior your team should practice consistently over the next 30 days?

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