



FREE PROFESSIONAL RESOURCE

Exceptional Customer Service Checklist

A shift-by-shift guide to serving with professionalism, ownership, healthy boundaries, and heart.

Use it. Practice it. Repeat it.

Based on Pocket Guide No. 1: The Foundation of Exceptional Customer Service
by Ahli Victoria Love

Before the Shift

Prepare yourself before you serve someone else.

- ☐ I arrived with enough time to become fully prepared.
- ☐ My appearance and hygiene meet the professional standard.
- ☐ My workspace is clean, organized, and customer-ready.
- ☐ I reviewed important updates, policies, products, or assignments.
- ☐ I identified anything that could affect service and asked for help early.
- ☐ I took a moment to breathe, reset, and manage my personal emotions.
- ☐ I chose three words for today's service: _____.

QUICK REFLECTION

What could distract me from serving well today?

What is one action I will take to protect the customer experience?

During Every Interaction

See the person before the transaction.

- ☐ I acknowledged the customer promptly—even if I was already helping someone.
- ☐ I used welcoming body language and a calm, respectful tone.
- ☐ I listened without interrupting or preparing a defensive response.
- ☐ I asked clarifying questions before assuming what the customer needed.
- ☐ I confirmed the request in my own words.
- ☐ I explained what I could do instead of focusing only on what I could not do.
- ☐ I gave accurate information and avoided guessing.
- ☐ I protected the customer’s privacy and confidential information.
- ☐ I provided a clear next step, owner, and realistic timeframe.
- ☐ I thanked the customer sincerely for the opportunity to help.

QUICK REFLECTION

Did the customer leave knowing what happens next?

What did my tone and body language communicate?

Difficult Moments & Service Recovery

Stay compassionate, skillful, and boundaried.

- ☐ I lowered my pace and voice instead of matching emotional intensity.
- ☐ I separated the person from the problem.
- ☐ I acknowledged the impact without agreeing to inaccurate claims.
- ☐ I used the HEART method: Hear, Empathize, Acknowledge, Resolve, Track.
- ☐ I apologized without blaming another employee or department.
- ☐ I offered realistic options within my authority.
- ☐ I involved a supervisor or safety resource when conduct became threatening, discriminatory, harassing, or unsafe.
- ☐ I documented important details accurately.
- ☐ I followed through—or made a warm handoff to the person responsible.

QUICK REFLECTION

What did the customer actually need beneath the frustration?

Did I resolve the concern or merely end the conversation?

End-of-Shift Reflection

Turn today's experience into tomorrow's improvement.

- ☐ I completed or transferred every outstanding commitment.
- ☐ I left accurate notes for the next employee or shift.
- ☐ I recognized one teammate who helped create a better experience.
- ☐ I identified one service success worth repeating.
- ☐ I identified one mistake or missed opportunity without attacking myself.
- ☐ I chose one improvement for my next shift.
- ☐ I protected confidential information when discussing the day.

QUICK REFLECTION

Today I served with heart when...

Tomorrow I will improve by...

One customer-service skill I want to strengthen is...

Ready to Go Deeper?

This checklist gives you the daily standard. The complete 47-page guide gives you the mindset, language, reflection tools, service-recovery method, 30-day challenge, and personal service pledge to make the standard stick.

Pocket Guide No. 1 **The Foundation of Exceptional Customer Service**

Available at www.ahtshub.com

Empowering Hearts. Equipping Minds. Inspiring Service.