



"Helping You Create Superior Service"

YBC "Build Better Service" Worksheet

Topic: **Developing a Customer Service Plan**

Instructions: Work through the questions quickly and use single word answers that best describe what you believe about the answer. Then go back through the questions more carefully and add more information. When time permits, sit down with additional paper and write out more complete answers about your thoughts on these topics.

Set your Customer Service goals – What do you want to accomplish?

Set your Customer Service strategies – How and who will accomplish your goals?

How will you measure your effectiveness?

How will your service be different than your competitors?

What will you do after any interaction to enhance customer service?

What will be your policies about returns, exchanges and refunds?

How and who will handle complaints?

How will you deal with special circumstances or requests?

What incentives and rewards will you offer for customer service excellence?

What are your benchmarks for service?

What are your standards? Are they in writing?

How will you deal with customers in person, on the telephone, on the Internet, by mail?

When and how often will you review this plan and other documents?

Who will deal with your worst-case CS issues? How will they be trained?

What system or process will you put in place to make information available to anyone trying to answer a customer's question?