FIVE STAR EXPERIENCES

"Create The Standards Your Customers Desire"

Five Star "CUSTOMER WALK"

Customer Experience Self-Assessment Tool

Should you have any questions pertaining to the use of this tool, please contact JB.
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Welcome to the Five Star Experiences “Customer Walk” self assessment tool and congratulations on taking the first step towards enhancing the experience you and your staff provide your customers.

With the hectic pace of many frontline roles, staff can often become locked into their daily routines and lose sight of the factors that would likely contribute to a better standard of personal service being practiced on a regular basis.

Taking the time to carefully assess that standard using a structured approach is a critical component of any successful business model where you have people interacting with people. That is just as important for your internal customers (colleagues) and your external customers.

This document is intended only as a template for you to use to create a comprehensive list of items to check as you conduct your own assessments. It is most beneficial when you and your staff take time out of the daily grind and make an honest assessment of the type of experience you offer your customers. A simple yet effective case of putting yourself in your customer’s shoes and trying to ‘see’ your own business through their eyes.

We recommend you include all of the following categories and consider as many factors as you can for each that may impact the experience your customers have when dealing with you and your team.

- PEOPLE
- PRODUCTS
- PLACE
- PROCESSES
- PROMOTIONS

Be sure to take into account not only the universal customer concerns but also the industry specific issues and on a more personal level, the issues surrounding your own staff and premises. If you are a franchisee, it is also important to include any brand specific concerns that may be required by your franchise agreement.

Once your list in complete, pass it around the team and invite their input to seek any additional items they feel should be included. This also gives you an opportunity to communicate what’s being monitored clearly to the team to highlight areas of focus and those needing the most improvement.

Schedule regular assessments (Customer Walks) and involve your staff so they are given an opportunity to provide their perspective of the things you assess. This may also uncover feedback from customers that might not have been passed on to you prior to that moment.

For those who feel there is a need to make more significant change or where customer complaints have been a growing concern, you might even take the step of inviting customers to complete the same survey in an effort to uncover any disparity between what you believe and what you are actually delivering.

MOMENTS OF TRUTH

In his book “Moments of Truth”, Jan Carlzon talked about the many opportunities we have to create an impression on our customers throughout a normal interaction or transaction.

As President of Scandinavian Airlines, he commissioned a study of the average experience of an airline passenger. The study documented every detail of the experience in an effort to understand just how many times during that process a passenger might be impressed or disappointed.

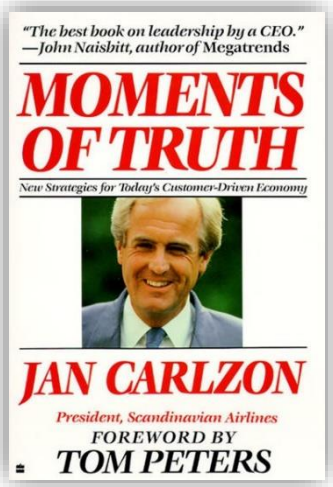
You might think all that really mattered was that they arrived safely with their luggage at their destination and that in doing so the passengers would all be happy and satisfied customers. In reality though, there were numerous other issues that also impacted on whether or not the passengers left the airport feeling happy with their experience. Even some seemingly insignificant concerns had passengers grumbling as they stood waiting for their luggage.

The book defines a Moment of Truth as “A unique, never to be repeated opportunity to make an impression on a customer”. And as it turned out, there were more than 300 moments that had the capacity to either positively or negatively influence the passenger’s emotional reaction to their experience before, during and after the flight.

So, as you work through the following pages and develop your checklist of points to assess as part of your tailored “Customer Walk”, it is important to consider what the Moments of Truth are for your industry, business and customers.

Remembering that the study of airline customers or passengers showed us that it is not just the delivery of the major points that are taken into consideration by your customers but also the far less significant details that are relevant to all, some or even just a few of your customers.

Sadly, the one thing you can count on is that unhappy customers will talk more about their experience than happy ones. In this time where Social Media plays such a massive role in how people decide who they are going to do business with, it is absolutely critical that you make every effort to ensure your customers have no reason to leave anything less than 100% satisfied with the experience.



SCORING

You can decide for yourself how you would like to score the overall rating. Regardless of how it is achieved, your goal is to **aim for a Five Star Rating for each category** and here is one suggestion for how it could be scored.

When working with clients, my approach is to first establish the total list of Moments of Truth (MOTs) for each category. The total number in each does not need to be equal and indeed it is intended that this be an organic list that evolves and is regularly revised each time you work with it as you identify new items to add or possibly remove if they are no longer relevant.

Next you simply determine what the total possible score for each category is by multiplying the number of items being assessed by 2 (the maximum score for each item assessed).

Once the assessment is completed and the scores are calculated, you can easily apply the percentages to each of the categories to establish the relevant star rating for each.

CATEGORY	NO. OF MOTS	X 2	Max. Total Score Possible	Actual Score	% of Max Possible Score
PEOPLE					
PRODUCTS					
PLACE					
PROCESSES					
PROMOTIONS					

EXAMPLE:

*A store manager sat down with his team and they assessed all the relevant Moments of Truth (MOTs) for the **PEOPLE** category and came up with a total of 18 items they were going to assess each time they conducted a Customer Walk.*

*Using the table above this meant a perfect score for their **PEOPLE** category would be 36. After conducting the assessment they discovered a few issues that needed addressing and the score they attributed to this category was 28/36.*

This translated to a score of 78% which if you refer to the table below, equated to a 4 star rating.

0 - 20% = ★
21 - 40% = ★★
41 - 60% = ★★★
61 - 80% = ★★★★
81 - 100% = ★★★★★

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Checklist Templates

The following pages are for you to use to create your checklists of relevant Moments of Truth (MOT) for for each category.

Note: There is a single page version that includes each of the sub-categories with a smaller number of MOT spaces as well as a multiple page version that addresses one sub-category per page for a more detailed final checklist.

MOT Item	SCORE	Comments
UNIVERSAL FACTORS		
1.	-2 -1 0 +1 +2	
2.	-2 -1 0 +1 +2	
3.	-2 -1 0 +1 +2	
4.	-2 -1 0 +1 +2	
5.	-2 -1 0 +1 +2	
6.	-2 -1 0 +1 +2	
7.	-2 -1 0 +1 +2	
8.	-2 -1 0 +1 +2	
INDUSTRY SPECIFIC FACTORS		
1.	-2 -1 0 +1 +2	
2.	-2 -1 0 +1 +2	
3.	-2 -1 0 +1 +2	
4.	-2 -1 0 +1 +2	
5.	-2 -1 0 +1 +2	
6.	-2 -1 0 +1 +2	
7.	-2 -1 0 +1 +2	
8.	-2 -1 0 +1 +2	
BRAND/FRANCHISE REQUIREMENTS		
1.	-2 -1 0 +1 +2	
2.	-2 -1 0 +1 +2	
3.	-2 -1 0 +1 +2	
4.	-2 -1 0 +1 +2	
5.	-2 -1 0 +1 +2	
6.	-2 -1 0 +1 +2	
7.	-2 -1 0 +1 +2	
8.	-2 -1 0 +1 +2	
LOCAL/BRANCH ISSUES		
1.	-2 -1 0 +1 +2	
2.	-2 -1 0 +1 +2	
3.	-2 -1 0 +1 +2	
4.	-2 -1 0 +1 +2	
5.	-2 -1 0 +1 +2	
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MOT Item	**SCORE**	**Comments**
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2.	-2 -1 0 +1 +2	
3.	-2 -1 0 +1 +2	
4.	-2 -1 0 +1 +2	
5.	-2 -1 0 +1 +2	
6.	-2 -1 0 +1 +2	
7.	-2 -1 0 +1 +2	
8.	-2 -1 0 +1 +2	
9.	-2 -1 0 +1 +2	
10.	-2 -1 0 +1 +2	
11.	-2 -1 0 +1 +2	
12.	-2 -1 0 +1 +2	
13.	-2 -1 0 +1 +2	
14.	-2 -1 0 +1 +2	
15.	-2 -1 0 +1 +2	
16.	-2 -1 0 +1 +2	
17.	-2 -1 0 +1 +2	
18.	-2 -1 0 +1 +2	
19.	-2 -1 0 +1 +2	
20.	-2 -1 0 +1 +2	

BRAND/FRANCHISE REQUIREMENTS		
MOT Item	**SCORE**	**Comments**
1.	-2 -1 0 +1 +2	
2.	-2 -1 0 +1 +2	
3.	-2 -1 0 +1 +2	
4.	-2 -1 0 +1 +2	
5.	-2 -1 0 +1 +2	
6.	-2 -1 0 +1 +2	
7.	-2 -1 0 +1 +2	
8.	-2 -1 0 +1 +2	
9.	-2 -1 0 +1 +2	
10.	-2 -1 0 +1 +2	
11.	-2 -1 0 +1 +2	
12.	-2 -1 0 +1 +2	
13.	-2 -1 0 +1 +2	
14.	-2 -1 0 +1 +2	
15.	-2 -1 0 +1 +2	
16.	-2 -1 0 +1 +2	
17.	-2 -1 0 +1 +2	
18.	-2 -1 0 +1 +2	
19.	-2 -1 0 +1 +2	
20.	-2 -1 0 +1 +2	

LOCAL/BRANCH ISSUES		
MOT Item	**SCORE**	**Comments**
1.	-2 -1 0 +1 +2	
2.	-2 -1 0 +1 +2	
3.	-2 -1 0 +1 +2	
4.	-2 -1 0 +1 +2	
5.	-2 -1 0 +1 +2	
6.	-2 -1 0 +1 +2	
7.	-2 -1 0 +1 +2	
8.	-2 -1 0 +1 +2	
9.	-2 -1 0 +1 +2	
10.	-2 -1 0 +1 +2	
11.	-2 -1 0 +1 +2	
12.	-2 -1 0 +1 +2	
13.	-2 -1 0 +1 +2	
14.	-2 -1 0 +1 +2	
15.	-2 -1 0 +1 +2	
16.	-2 -1 0 +1 +2	
17.	-2 -1 0 +1 +2	
18.	-2 -1 0 +1 +2	
19.	-2 -1 0 +1 +2	
20.	-2 -1 0 +1 +2	

MOT Item	SCORE	Comments
UNIVERSAL FACTORS		
1.	-2 -1 0 +1 +2	
2.	-2 -1 0 +1 +2	
3.	-2 -1 0 +1 +2	
4.	-2 -1 0 +1 +2	
5.	-2 -1 0 +1 +2	
6.	-2 -1 0 +1 +2	
7.	-2 -1 0 +1 +2	
8.	-2 -1 0 +1 +2	
INDUSTRY SPECIFIC FACTORS		
1.	-2 -1 0 +1 +2	
2.	-2 -1 0 +1 +2	
3.	-2 -1 0 +1 +2	
4.	-2 -1 0 +1 +2	
5.	-2 -1 0 +1 +2	
6.	-2 -1 0 +1 +2	
7.	-2 -1 0 +1 +2	
8.	-2 -1 0 +1 +2	
BRAND/FRANCHISE REQUIREMENTS		
1.	-2 -1 0 +1 +2	
2.	-2 -1 0 +1 +2	
3.	-2 -1 0 +1 +2	
4.	-2 -1 0 +1 +2	
5.	-2 -1 0 +1 +2	
6.	-2 -1 0 +1 +2	
7.	-2 -1 0 +1 +2	
8.	-2 -1 0 +1 +2	
LOCAL/BRANCH ISSUES		
1.	-2 -1 0 +1 +2	
2.	-2 -1 0 +1 +2	
3.	-2 -1 0 +1 +2	
4.	-2 -1 0 +1 +2	
5.	-2 -1 0 +1 +2	
6.	-2 -1 0 +1 +2	
7.	-2 -1 0 +1 +2	
8.	-2 -1 0 +1 +2	

UNIVERSAL FACTORS		
MOT Item	**SCORE**	**Comments**
1.	-2 -1 0 +1 +2	
2.	-2 -1 0 +1 +2	
3.	-2 -1 0 +1 +2	
4.	-2 -1 0 +1 +2	
5.	-2 -1 0 +1 +2	
6.	-2 -1 0 +1 +2	
7.	-2 -1 0 +1 +2	
8.	-2 -1 0 +1 +2	
9.	-2 -1 0 +1 +2	
10.	-2 -1 0 +1 +2	
11.	-2 -1 0 +1 +2	
12.	-2 -1 0 +1 +2	
13.	-2 -1 0 +1 +2	
14.	-2 -1 0 +1 +2	
15.	-2 -1 0 +1 +2	
16.	-2 -1 0 +1 +2	
17.	-2 -1 0 +1 +2	
18.	-2 -1 0 +1 +2	
19.	-2 -1 0 +1 +2	
20.	-2 -1 0 +1 +2	

INDUSTRY SPECIFIC FACTORS		
MOT Item	**SCORE**	**Comments**
1.	-2 -1 0 +1 +2	
2.	-2 -1 0 +1 +2	
3.	-2 -1 0 +1 +2	
4.	-2 -1 0 +1 +2	
5.	-2 -1 0 +1 +2	
6.	-2 -1 0 +1 +2	
7.	-2 -1 0 +1 +2	
8.	-2 -1 0 +1 +2	
9.	-2 -1 0 +1 +2	
10.	-2 -1 0 +1 +2	
11.	-2 -1 0 +1 +2	
12.	-2 -1 0 +1 +2	
13.	-2 -1 0 +1 +2	
14.	-2 -1 0 +1 +2	
15.	-2 -1 0 +1 +2	
16.	-2 -1 0 +1 +2	
17.	-2 -1 0 +1 +2	
18.	-2 -1 0 +1 +2	
19.	-2 -1 0 +1 +2	
20.	-2 -1 0 +1 +2	

BRAND/FRANCHISE REQUIREMENTS		
MOT Item	**SCORE**	**Comments**
1.	-2 -1 0 +1 +2	
2.	-2 -1 0 +1 +2	
3.	-2 -1 0 +1 +2	
4.	-2 -1 0 +1 +2	
5.	-2 -1 0 +1 +2	
6.	-2 -1 0 +1 +2	
7.	-2 -1 0 +1 +2	
8.	-2 -1 0 +1 +2	
9.	-2 -1 0 +1 +2	
10.	-2 -1 0 +1 +2	
11.	-2 -1 0 +1 +2	
12.	-2 -1 0 +1 +2	
13.	-2 -1 0 +1 +2	
14.	-2 -1 0 +1 +2	
15.	-2 -1 0 +1 +2	
16.	-2 -1 0 +1 +2	
17.	-2 -1 0 +1 +2	
18.	-2 -1 0 +1 +2	
19.	-2 -1 0 +1 +2	
20.	-2 -1 0 +1 +2	

LOCAL/BRANCH ISSUES		
MOT Item	**SCORE**	**Comments**
1.	-2 -1 0 +1 +2	
2.	-2 -1 0 +1 +2	
3.	-2 -1 0 +1 +2	
4.	-2 -1 0 +1 +2	
5.	-2 -1 0 +1 +2	
6.	-2 -1 0 +1 +2	
7.	-2 -1 0 +1 +2	
8.	-2 -1 0 +1 +2	
9.	-2 -1 0 +1 +2	
10.	-2 -1 0 +1 +2	
11.	-2 -1 0 +1 +2	
12.	-2 -1 0 +1 +2	
13.	-2 -1 0 +1 +2	
14.	-2 -1 0 +1 +2	
15.	-2 -1 0 +1 +2	
16.	-2 -1 0 +1 +2	
17.	-2 -1 0 +1 +2	
18.	-2 -1 0 +1 +2	
19.	-2 -1 0 +1 +2	
20.	-2 -1 0 +1 +2	

FIVE STAR EXPERIENCES

"Create The Standards Your Customers Desire"

MOT Worksheets

The following page is a worksheet for you to use in addressing those MOTs you identify as requiring attention

CATEGORY:

MOT Item:

How did you rate this aspect of your business? **-2** **-1** **0** **+1** **+2**

What were the positives observed with regard to this item?

What were the negatives observed with regard to this item?

What are some possible strategies for improvement?