



## **FIVE STAR EXPERIENCES**

*“Create happy customers by design”*



# **Five Star Experiences “CUSTOMER WALK”**

## **CX 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 team 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 equally important for both your internal customers (the team) 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 is 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.

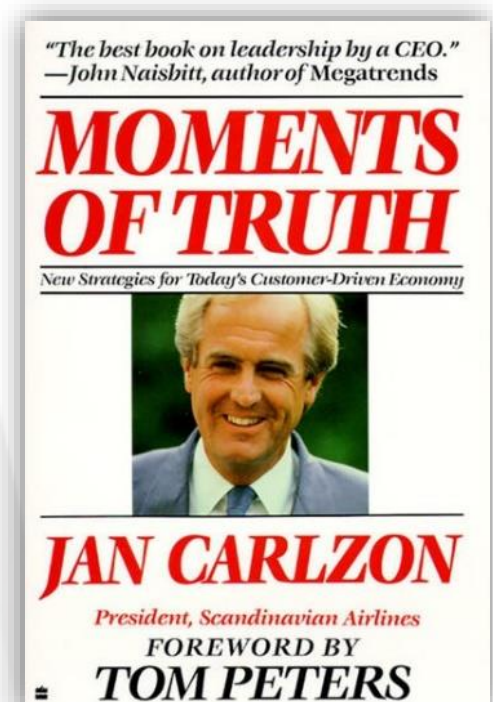
Remembering that the study of airline customers or passengers showed us that it is not just the delivery of the major points that are taken into consideration by your customers but also the far less significant details that are relevant to all, some or even just a few of your customers.

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.

**Note:**

*For the purpose of the Five Star Customer Walk tool, Moments of Truth are referred to as “CX Factors”.*



# Scoring System

Your goal is to **aim for a Five Star Rating for each CX category** and here is one way it could be scored.

First, establish a list of all the relevant Factors 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. You can add new items as you identify them or remove them if they are no longer relevant.

Remember, you are rating yourself against your Customers' expectations not your own. You need to allow for not only a positive score for those factors where you feel you are likely to exceed their expectations but also a negative score for those where you feel you might fall short. In order to also allow for extreme highs and extreme lows, we recommend you use the following rating scale:

**-2 -1 0 +1 +2**

Next you simply determine what the total possible score for each category is by multiplying the number of factors 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.

## **EXAMPLE:**

*A store manager sat down with his team and they assessed all the relevant Factors for the **PEOPLE** category and came up with a total of 12 items they were going to assess each time they conducted a Customer Walk.*

*Using the table below, this meant a perfect score for their **PEOPLE** category would be 24.*

*After conducting the assessment they discovered a few issues that needed addressing and the score they attributed to this category was 16/24.*

*This translated to a score of 68% which if you refer to the scale below, equates to a 4 star rating.*

CATEGORY	NO. of Factors	Maximum Score per Factor	Max. Total Score Possible	Actual Score	% of Max Possible Score	Star Rating
<b>PEOPLE</b>	12	(x) 2	24	16	68%	4

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



# PEOPLE

CX Factors	SCORE	Comments
<b>UNIVERSAL</b>		
1. Customer Orientation	-2 -1 0 +1 +2	
2. Great Team Members	-2 -1 0 +1 +2	
3. Team Effectiveness	-2 -1 0 +1 +2	
4. Team Knowledge	-2 -1 0 +1 +2	
5. Team Management	-2 -1 0 +1 +2	
<b>TOTAL</b>		
<b>INDUSTRY SPECIFIC*</b>		
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	
<b>TOTAL</b>		
<b>BRAND/FRANCHISE REQUIREMENTS*</b>		
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	
<b>TOTAL</b>		
<b>LOCAL/BRANCH ISSUES*</b>		
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	
<b>TOTAL</b>		

*\*Remember to add any additional Industry, Brand or relevant Local CX Factors you feel should be assessed in this category*

CATEGORY	NO. of Factors	Maximum Score per Factor	Max. Total Score Possible	Actual Score	% of Max Possible Score	Star Rating
<b>PEOPLE</b>						



# PRODUCTS

CX Factors	SCORE	Comments
<b>UNIVERSAL</b>		
1. Broad Range	-2 -1 0 +1 +2	
2. Excellent Quality	-2 -1 0 +1 +2	
3. Great Value	-2 -1 0 +1 +2	
4. Well Merchandised	-2 -1 0 +1 +2	
5. Stock Levels	-2 -1 0 +1 +2	
<b>TOTAL</b>		
<b>INDUSTRY SPECIFIC*</b>		
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	
<b>TOTAL</b>		
<b>BRAND/FRANCHISE REQUIREMENTS*</b>		
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	
<b>TOTAL</b>		
<b>LOCAL/BRANCH ISSUES*</b>		
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	
<b>TOTAL</b>		

*\*Remember to add any additional Industry, Brand or relevant Local CX Factors you feel should be assessed in this category*

CATEGORY	NO. of Factors	Maximum Score per Factor	Max. Total Score Possible	Actual Score	% of Max Possible Score	Star Rating
<b>PRODUCTS</b>						



# PLACE

CX Factors	SCORE	Comments
<b>UNIVERSAL</b>		
1. Presentation	-2 -1 0 +1 +2	
2. Atmosphere	-2 -1 0 +1 +2	
3. Facilities	-2 -1 0 +1 +2	
4. Signage	-2 -1 0 +1 +2	
5. Site	-2 -1 0 +1 +2	
<b>TOTAL</b>		
<b>INDUSTRY SPECIFIC*</b>		
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	
<b>TOTAL</b>		
<b>BRAND/FRANCHISE REQUIREMENTS*</b>		
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	
<b>TOTAL</b>		
<b>LOCAL/BRANCH ISSUES*</b>		
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	
<b>TOTAL</b>		

*\*Remember to add any additional Industry, Brand or relevant Local CX Factors you feel should be assessed in this category*

CATEGORY	NO. of Factors	Maximum Score per Factor	Max. Total Score Possible	Actual Score	% of Max Possible Score	Star Rating
<b>PLACE</b>						



# PROCESSES

CX Factors	SCORE	Comments
<b>UNIVERSAL</b>		
1. Customer Engagement	-2 -1 0 +1 +2	
2. Sales Process	-2 -1 0 +1 +2	
3. Aftersales Process	-2 -1 0 +1 +2	
4. Follow-up & Feedback	-2 -1 0 +1 +2	
5. Design, Review & Training	-2 -1 0 +1 +2	
<b>TOTAL</b>		
<b>INDUSTRY SPECIFIC*</b>		
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	
<b>TOTAL</b>		
<b>BRAND/FRANCHISE REQUIREMENTS*</b>		
1.	-2 -1 0 +1 +2	
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3.	-2 -1 0 +1 +2	
4.	-2 -1 0 +1 +2	
5.	-2 -1 0 +1 +2	
<b>TOTAL</b>		
<b>LOCAL/BRANCH ISSUES*</b>		
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	
<b>TOTAL</b>		

*\*Remember to add any additional Industry, Brand or relevant Local CX Factors you feel should be assessed in this category*

CATEGORY	NO. of Factors	Maximum Score per Factor	Max. Total Score Possible	Actual Score	% of Max Possible Score	Star Rating
<b>PROCESSES</b>						





# PROMOTIONS

CX Factors	SCORE	Comments
<b>UNIVERSAL</b>		
1. Online Presence	-2 -1 0 +1 +2	
2. Community Engagement	-2 -1 0 +1 +2	
3. CRM Activities	-2 -1 0 +1 +2	
4. Marketing Campaigns	-2 -1 0 +1 +2	
5. Special Events	-2 -1 0 +1 +2	
<b>TOTAL</b>		
<b>INDUSTRY SPECIFIC*</b>		
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	
<b>TOTAL</b>		
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3.	-2 -1 0 +1 +2	
4.	-2 -1 0 +1 +2	
5.	-2 -1 0 +1 +2	
<b>TOTAL</b>		

*\*Remember to add any additional Industry, Brand or relevant Local CX Factors you feel should be assessed in this category*

CATEGORY	NO. of Factors	Maximum Score per Factor	Max. Total Score Possible	Actual Score	% of Max Possible Score	Star Rating
<b>PROMOTIONS</b>						





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# CX Factor Worksheet

The following page is a worksheet for you to print and use in addressing any CX Factors you identify require attention



# CATEGORY:

Factor:

How did you rate this factor?    **-2**    **-1**    **0**    **+1**    **+2**

What were the positives observed with regard to this item?

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What were the negatives observed with regard to this item?

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What are some possible strategies for improvement?

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# The Five Star Experiences Customer Success Blueprint

Create happy customers by design

INCREASED SALES, GREATER LOYALTY, BETTER QUALITY REFERRALS



**Most business owners believe they offer superior standards in Customer Experience yet research shows that only 8% of their customers agree with them.**

This means they miss the opportunity for increased sales, greater loyalty and better-quality referrals from up to 92% of their customers who are indifferent about buying from them again.

**Australian companies lose over 30% of customers a year due to poor brand loyalty. The #1 reason for this is poor Customer Experience, NOT the products or services they sell!**

The core of all these issues is often the lack of a strong plan for excellent experiences for your staff and customers.

Our approach is to implement an on-going program, designed to address the specific requirements of your market, your industry, your business, your customers.

This carefully tailored blueprint is designed to nurture a customer centric culture, committed to maintaining the highest standards in all aspects of customer engagement.

The likely benefits of implementing a Five Star Experiences Customer Success Blueprint are:

- ✓ Increased Customer Loyalty
- ✓ Consistent Repeat Business
- ✓ Stronger Conversion Rates
- ✓ Greater Market Share
- ✓ Increased Revenue
- ✓ Healthy Profit Margins
- ✓ Better Quality Referrals
- ✓ Reduced Customer Acquisition Costs



The ROI on refining your Customer Environment will be significant. Bain & Co. and HBR reported:

**“Just 5% increase in Customer Retention can increase your profit by a MASSIVE 25 - 95%”**

For 20 years I've been refining customer experiences in the Retail, Hospitality and Tourism. I'll help you develop a tailored plan to create happy customers by design and maximise your returns.

To understand the full value of a Customer Success plan and discuss how this may benefit your business, call me today on 0412 389 218 for a confidential, free chat.

