

The only customer service audit checklist you'll ever need:

30+ SKILLS & TOOLS ANY BUSINESS SHOULD OPTIMIZE.

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When did customer service become so complicated?

Maybe when the world got complicated. We live in a dizzyingly elaborate, interconnected global society teeming with people, technology, organizations, and their various competing interests. An action as simple as finding a plumber to fix a leaky sink can bring someone into contact with multiple channels, opinions, advertisers, and behind-the-scenes systems. From Google to Yelp to Aunt Irene, everyone and everything has an influence over a customer's thoughts and behavior.

As a result, customer service is more challenging—and more important—than ever. It's the key differentiating factor between businesses that succeed and grow and businesses that drown in the noise. Customers expect better, more personalized service within minutes of reaching out to a business. That means you need to remain available and ready to be friendly, professional, and responsive at all times. This is particularly true for small businesses, whose best shot at outperforming the big guys is through customer service.

With all this in mind, many business owners get lost in calculating the customer service equation:

- What should you invest in?
- What are the most important customer service skills?
- What do your customers actually care about?

To help you succeed and grow in today's business environment, we've distilled everything we've learned and consolidated the most important best practices into the only customer service checklist you'll ever need.

Use this resource when monitoring your customer service to audit your approach and optimize your customers' experiences. We've also included a wealth of information about the most important customer service skills, from the basics to the advanced.

Your customer service audit checklist.



Customer Service Audit from Ruby

Start with the basics.

Make sure your business has a solid foundation that enables you to deliver on the promise of your service before you start worrying about more sophisticated customer experience protocols.

1. A robust, flexible customer service infrastructure is in place.

Every business needs to serve its customers where they actually are. That means having a multichannel (or omnichannel) presence: customer service is available in-person and via phone, email, live website chat, social media—anywhere customers are active and looking to reach out. Some form of customer service also needs to be available 24 hours a day, 7 days a week, 365 days per year. Keep in mind that not every customer makes contact within the confines of business hours, and product and service issues don't take days off. For many businesses, this isn't feasible or cost-effective to manage in-house, which is where on-demand virtual receptionist services come in.

2. All customer service team members are fully trained.

Your receptionist(s) and other customer service staff shouldn't be making things up as they go along. People who welcome visitors, answer phones, and respond online need to know how to greet customers properly, deal with challenging situations, route inquiries to the right person at your organization, and more.

3. Customer service training is ongoing.

Training isn't something that only happens once. Customer service team members need to take refresher courses periodically, learn about new practices and technologies as they're introduced in your business, and engage in continuous education and continual improvement. Learn six tips anyone can use to sharpen their customer service skills.

4. Customer service is available by phone.

You need to have a business phone number. And whenever possible, when someone calls that number, a human being should answer. Customers don't want to reach voicemail or deal with an Interactive Voice Response (IVR) system. The phone is more important than ever, and every missed call is a missed opportunity.

5. Your phone number is easy to find.

Your customers shouldn't be spending time digging through business listings to find your phone number or trying to determine which of multiple numbers is the correct one. Make sure your business's phone number is available in a prominent location on your website, social media profiles, and any marketing and sales materials. Ideally, it should come up in the title or meta description when someone performs a web search for your company.

6. Customer service is available through live chat.

Don't think you need to offer chat on your website? Consider the facts:

- 42% of all customers prefer chat over other communication channels.
- 73% of consumers are satisfied with their experiences on live chat—the highest level of all customer service channels.
- Chat prospects are 4.6 times more likely than other prospects to convert into customers.

Read more about how live chat can benefit your business—and how to do it right.

7. Customer service is available through email.

Not every customer service question can be answered through chat, and not every visitor to your website wants to communicate with someone live. You also need to be ready to accept and respond to emails to your business. You should be checking the inbox regularly (at least once a day, if not more often) and replying to most emails within 24 hours. As with your phone number, your business's email address should be displayed prominently.

8. Customer service is available via social media.

An increasing number of customers are turning to social media sites such as Twitter, Facebook, and Instagram to connect with brands. If your business is unavailable to respond to their posts, tweets, comments, and direct messages, those customers will turn to your competitors. No matter your company's size, location, or industry, you need a social media customer service plan.

9. You've created a comfortable, welcoming environment—physically, virtually, or both.

One of the most important—and most frequently overlooked—elements of customer experience is the customer's first interaction in the business's space. We're talking about physical spaces, such as lobbies, offices, and waiting rooms, as well as websites and other digital spaces. In terms of the former, you need to consider fundamental questions like the following:

- How do guests feel when they enter your business?
- What's the first thing they see?
- Is there a comfortable place to sit?

10. You have support for off-hours and after-hours service.

As we laid out in tip #1, customer service can't really go dark or take days off. You need to have a solution in place for people who contact you when you're closed or too busy to answer immediately. Outsourcing is your friend here. Ruby's virtual receptionist services ensure no call or chat goes unanswered.

11. Customer service wait times are minimal.

Whenever and however they contact your business, your customers don't want to wait. The majority of consumers (approximately 80%) expect service within an hour of reaching out, and most of those people (75%) expect it within just five minutes. The more time they have to wait—the more rings they have to sit through—the higher the chances they'll look elsewhere.

12. Calls are screened and transferred efficiently.

Excellent customer service starts before anyone says "hello." Smart businesses have systems in place to automatically route callers to the right person—e.g., to connect customers in specific areas to the appropriate regional offices or to ensure callers during a busy period don't reach a busy line. When technology isn't available, human customer service professionals should be trained to seamlessly transfer calls by asking the right questions and acting quickly.

13. Team members are greeting people in a professional, friendly manner.

There are right ways and wrong ways to greet customers. Here's how we do it at Ruby:

- Start with a greeting. It could be "Hello," or "Thank you for calling," or "Good morning/afternoon," or a combination of all three.
- Say the customer's name. A plain "Hello" can be confusing to callers; they want to know that they've called the right place.
- Offer assistance. You can say "How may I help you?" or "How may I assist you?" or—when you're routing calls rather than addressing questions directly—"How may I direct your call?" If there's a question you need to ask every customer ("What's your account number?"), this is the time to ask it—again, in a professional, friendly way ("May I have your account number, please?")

For a comprehensive guide on what to say when greeting and talking to callers, download our free ebook.

14. You offer customer service in more than one language.

With the United States on track to become the largest Spanish-speaking country in the world, this one grows more important with each passing day. Businesses can no longer afford to be completely monolingual. You should be delivering the same quality of service to everyone you do business with, regardless of which language they speak. Learn how to overcome the language barrier.

15. Team members practice active listening.

Customer service is about the customer. Your business needs to show you care about the people you serve by truly being present in customer conversations. That means listening attentively and never assuming that a customer wants or needs. You can practice active listening by taking notes, offering small verbal cues ("yep," "that's right," "mm-hmm"), reiterating what you've heard, and responding in ways that indicate you're being paying close attention. It's an art, but it's one that's easy to learn and master.

16. Team members demonstrate knowledge of your products and/or services.

Your customer service workers should know what they're talking about. They may not be able to provide information about your products or services in as much depth as your salespeople could, but they should be able to answer basic questions and demonstrate some level of expertise in your industry or niche—the issues, concerns, jargon, technology, news, and trends specific to your line of business.

17. Team members keep conversations positive, personal, and quick.

Again, customer service needs to be customer-centric. Your customers aren't looking to waste time engaging in idle chatter, but they also don't want to be treated in a gruff or impersonal manner. Customer service professionals can achieve the right balance by responding as quickly as possible, greeting customers graciously, personalizing every interaction (e.g. using a caller's name), minding their manners, and remaining calm. It's equally important to eliminate unnecessary obstacles, avoid dead ends, and not obsess over mistakes. Learn conversational dos and don'ts.

18. Team members are aware of and comply with all relevant rules and regulations.

Your customer service team members need to be trained in any laws and regulations, such as the Health Insurance Portability and Accountability Act (HIPAA), that might apply to your business. This isn't just about following the rules and avoiding fines and jail time; it's also about treating customers ethically and with respect. Keep in mind that your customer service staff represent your business—their words and actions are your words and actions, and without proper training, they can get you into trouble.

19. Team members clearly communicate brand values.

Representing a business means communicating in a way that aligns with everything that business stands for. Your customer service team needs to live and breathe your company's mission, purpose, and values. From the moment they get in contact with a business representative, your customers should have a sense of what's special about your company.

20. Team members personalize customer service interactions.

If you want to build trust with your customers (and trust us, you do), you need to focus on forging and nurturing relationships. If your customers see your company as a cherished resource or friend, rather than simply a service they require, they become loyal supporters and enthusiastic advocates. Here are a few of our tried-and-true strategies for personalizing service:

- Remember—and use!—every customer's name.
- Use customers' forms of communication, such as birthday notes, that aren't (explicitly) "sales-y."
- Keep track of milestones in regular customers' lives and businesses (new offices, marriages, babies, etc).
- Ensure you're providing every customer with service that matches their particular need.

21. Team members are able to effectively handle difficult questions.

No one wants to hear "I don't know." Great customer service professionals know that it's not about having the answer to every question, but about knowing what to say when you don't know. Instead of saying "I don't know," they should emphasize what they can do. Think: "Let me find out for you," or "Let me connect you with the best person to help you."

Here is a quick video about why the phrase "I don't know" is actually the worst:

22. Team members are empowered to solve customers' problems and go the extra mile.

If you give your frontline customer service team members the tools and freedom they need, they'll provide extraordinary service. Ruby's entire staff has access to a prepaid Amazon account, and when a team member feels moved to send something special to a customer, they're free to make it happen—no questions asked. Employees feel respected, trusted, and valued through this empowerment—and customers are delighted by their thoughtful gestures.

23. Customer inquiries and issues are escalated when necessary.

When the customer service team can't provide a customer with the help that person needs, there should be a process in place to connect the customer to someone who can serve them. And when a customer has a problem with a member of the customer service team, they should know how to and be able to easily file a complaint and resolve the issue with a supervisor.

24. Team members anticipate customers' needs.

Excellent customer service professionals seem like psychics—they know what a customer wants and needs before the person even thinks to ask. This isn't as difficult as it may sound. It often takes the form of reading cues and taking small actions. Examples include...

- Sending a care package to a client who missed a meeting due to a personal loss
- Not scheduling an appointment for a patient's birthday
- Interpreting a hesitant "sure" as a signal to offer an alternative solution
- Keeping dog treats handy

Discover how to WOW customers by delivering the unexpected.

25. Team members foster connections with customers.

This is the big one. Connection is at the core of good customer service. It's the secret ingredient among brands that establish passionate followings and robust books of business without ever spending a dollar on advertising. All of these tips can ultimately help you foster connections with customers, but if you're looking for quick, actionable tips you can put into practice today, we've got you covered.

For a more thorough exploration of this topic, download our free ebook, The ROI of Business Connections: A Business Guide.

26. Team members follow up with customers after conversations.

The work doesn't end when the customer hangs up the phone or closes the chat window. Your business can and should keep the conversation going by following up (in a helpful and welcome way, of course): send an email thanking the customer for calling, perhaps including a summary of what was discussed along with any applicable informational resources or perhaps a bonus discount code—anything that shows you're thinking about the customer and care.

27. Team members are engaged and happy at work.

Your customer service representatives can't make customers happy if they aren't happy themselves. Study after study demonstrates the link between employee engagement and customer satisfaction. Learn how to improve your bottom line by fostering happiness.

28. You have developed a positive, inclusive organizational culture.

Culture and employee engagement are closely linked—and both drive business success. According to Daniel Coyle, author of The Culture Code: The Secrets of Highly Successful Groups, healthy organizational cultures tend to exist where people feel safe, are willing to be vulnerable, and share a purpose. Organizational culture also needs to be diverse and inclusive; when you leave people out, you leave out their ideas, perspectives, and talents. These are the elements that bind together any strong community, but they don't arise out of nowhere. As a business leader, you need to build and nurture culture. How? At Ruby, we do it by encouraging employees to work together, help one another, share in each other's successes, and contribute to something bigger than themselves.

29. You've specified and are monitoring customer service KPIs.

If you don't know what your goals are or how to track them, you'll have a hard time reaching them. And if you haven't connected your customer service efforts to your larger business objectives, you have no way to improve your approach, let alone ensure customers are being treated right. You need to specify, monitor, and measure key performance indicators (KPIs). Common customer service metrics include customer satisfaction (CSAT) score, net promoter score (NPS), customer effort score (CES), churn rate, retention rate, response time, and resolution time.

30. You keep track of all conversations with customers and leads.

Customer service team members should not be starting completely fresh when speaking with someone who's previously contacted your business. People tend to get frustrated and feel mistreated when they need to repeat information or reintroduce themselves. Be sure to maintain a database of customers and leads so your team can keep track of who's getting in touch, when, and why. There are plenty of customer relationship management (CRM) applications out there—check out your options and implement a system at your organization if you haven't already.

31. You regularly collect feedback from customers—outside of transactional conversations.

Be sure to ask your customers what you can do to improve their experiences. This means more than simply soliciting product reviews or business ratings. Get to know your customers and what you could do to serve them better. What aspects of your business do they care about the most? What frustrates them? What would they improve?

32. You incorporate feedback into your customer service approach and business model.

Don't just listen to what your customers tell you; implement it in your business. Show that you care about your customers by tailoring your products and services to their needs—starting with your customer service approach. After all, if your customer service doesn't serve customers, what's the point?

And that's our customer service audit checklist!

How did you do?

- What areas of customer service do you have under control?
- What needs improvement?

Wherever your business stands today, you don't have to manage the complexities of customer service by yourself. Ruby's team of virtual receptionists can help you...

- Grow your business,
- Deliver personalized experiences,
- Build customer loyalty, and
- Stay connected anywhere, anytime.

Your Customer Service Audit Checklist

- 1. A robust, flexible customer service infrastructure is in place.
- 2. All customer service team members are fully trained.
- 3. Customer service training is ongoing.
- 4. Customer service is available by phone.
- 5. Your phone number is easy to find.
- 6. Customer service is available through live chat.
- 7. Customer service is available through email.
- 8. Customer service is available via social media.
- 9. You've created a comfortable, welcoming environment—physically, virtually, or both.
- 10. You have support for off-hours and after-hours service.
- 11. Customer service wait times are minimal.
- 12. Calls are screened and transferred efficiently.
- 13. Team members are greeting people in a professional, friendly manner.
- 14. You offer customer service in more than one language.
- 15. Team members practice active listening.
- 16. Team members demonstrate knowledge of your products and/or services.
- 17. Team members keep conversations positive, personal, and quick.
- 18. Team members are aware of and comply with all relevant rules and regulations.
- 19. Team members clearly communicate brand values.
- 20. Team members personalize customer service interactions.
- 21. Team members are able to effectively handle difficult questions.
- 22. Team members are empowered to solve customers' problems and go the extra mile.
- 23. Customer inquiries and issues are escalated when necessary.
- 24. Team members anticipate customers' needs.
- 25. Team members foster connections with customers.
- 26. Team members follow up with customers after conversations.
- 27. Team members are engaged and happy at work.
- 28. You have developed a positive, inclusive organizational culture.
- 29. You've specified and are monitoring customer service KPIs.
- 30. You keep track of all conversations with customers and leads.
- 31. You regularly collect feedback from customers—outside of transactional conversations.
- 32. You incorporate feedback into your customer service approach and business model.

Have more tips or experiences with customer service that you would like to share?

Email us at rubyreads@ruby.com.

Get started with Ruby today!

We're here to serve you by serving your customers.

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