



## service attitudes report card

### Instructions

Use this checklist to rate service attitudes throughout the firm. Rate each item 0-5 with 5 as the highest. After rating each, look at the overall score and the scores on individual items. How can you help the firm in the low-scoring areas?

Telephone is answered quickly, cheerfully with regular callers remembered. \_\_\_\_\_

All telephone calls are returned promptly. \_\_\_\_\_

Inquiries for information or service receive a quick response. \_\_\_\_\_

Reception area is attractive and tidy. \_\_\_\_\_

Visitors are helped to feel welcome and important. \_\_\_\_\_

Offices and meeting areas are neat and uncluttered. \_\_\_\_\_

Environment feels cheerful, harmonious and positive. \_\_\_\_\_

Meetings with clients are focused and uninterrupted. \_\_\_\_\_

Employees and partners are trained to discover what clients really want. \_\_\_\_\_

Work is completed and delivered when promised. \_\_\_\_\_

Work product, advice or instructions are easily understood by clients. \_\_\_\_\_

Clients are educated about the services or products the we provide. \_\_\_\_\_

Mission statement of business reflects the importance of quality client service. \_\_\_\_\_

Clients are asked to recommend service improvements. \_\_\_\_\_

Client recommendations are implemented. \_\_\_\_\_

Client service feedback loop is established and maintained. \_\_\_\_\_

Appropriate employees are hired for each position. \_\_\_\_\_

Each position has training modules and service standards. \_\_\_\_\_

Partners and staff understand what it takes to develop and keep clients. \_\_\_\_\_



service attitudes report card (cont.)

There is competent handling of exceptions and problems posed by clients. \_\_\_\_\_

Client and employee needs are clearly understood within the business. \_\_\_\_\_

Client and employee needs are consistently met. \_\_\_\_\_

Clients and employees feel valued and important. \_\_\_\_\_

Personal relationships are developed with clients. \_\_\_\_\_

Client satisfaction is systematically measured and monitored. \_\_\_\_\_

Employees are rewarded for providing superior service. \_\_\_\_\_

Company product is well-packaged and attractively presented. \_\_\_\_\_

Billings are timely and understandable. \_\_\_\_\_

Prices charged represent value provided. \_\_\_\_\_

All employees are encouraged to grow, change and try new ideas. \_\_\_\_\_

Firm members gather regularly to discuss what can be improved in business. \_\_\_\_\_

There are a minimum of barriers between frontline employees and management. \_\_\_\_\_

Staff recommendations are solicited and implemented. \_\_\_\_\_

Profits of business are shared with those who created them. \_\_\_\_\_

Business service attitudes score: \_\_\_\_\_

(Perfect score = 170)

Any additional comments you would like to offer about service attitudes in the firm: