

Customer Service Checklist



Yvonne A Jones

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Strategies for Creating a Dynamic System to Deliver Superior Customer Service and Create WOW Experiences

Creating a customer service system and delivering WOW experiences that retain customers can be overwhelming.

Having a good checklist can make a world of difference. This checklist covers major areas you need to focus on to create a successful Customer Service and Retention Program.

Whether you're a Digital Marketer, where 90% of your business is online, or a brick and mortar or service business where 90% of your business is offline with an online presence, you need to establish systems in your business.

Failure to do so will result in inconsistent delivery of customer service and confusion about what your brand represents. Your customers will not know what to expect of you, thus leaving them confused and opening the way for customer attrition.



What Is Customer Service?

"Customer service is the direct one-on-one interaction between a consumer making a purchase and a representative of the company that is selling it. Most retailers see this direct interaction as a critical factor in ensuring buyer satisfaction and encouraging repeat business." ~ Investopedia ~

Creating Your Customer Service Systems

- **Map Your System.** Outline the steps that your customer takes from first contact to when they leave your funnel. (Use this map to identify the Standard Operating Procedures (SOP's) that you need to create)
- **Leverage Technology.** Review your customer service systems and goals. What technologies can support you to succeed? Identify and implement those technologies into your systems. For example, a simple autoresponder can send instant Thank You's to new customers and follow up immediately with contact form inquiries. A ticket system can automate and streamline much of your customer service system.
- **Review your buying and checkout process.** Walk through your current shopping cart and check-out process. What's missing? What can you do to reduce clicks, make the customer feel more secure, and avoid abandoned shopping carts? Implement those tactics.
- **Create a Follow-up Plan.** How will you follow up with customers after a purchase/ Map it out and create a plan. For example, will you send a thank you? What about an upsell offer? Can you check in with them a week later for feedback and to make another special offer?
- **Make Customers feel appreciated.** How can you make your customer feel appreciated? Create a plan to help your customers know how grateful you are for their business. Consider sending them Thank You cards, freebies, special offers, promotions, exclusive content, and first dibs on limited products.
- **Improve your delivery.** Take a look at how you deliver your products. Can it be improved? Can you deliver your products more quickly? Can you enhance the delivery process and over deliver? For example, maybe your delivery process can be streamlined and offer a free download.
- **Review current refunds and abandoned carts.** How many refunds do you currently manage? How many abandoned shopping carts do you have each month? First, take time to discover why? Implement systems and strategies to reduce those occurrences.
- **Personalize your messages.** Even if you choose to outsource and/or automate your customer service, you can personalize it. Give your customer service team scripts and templates to work from. Include sales and marketing messages when relevant. Add your brand and voice to your automated messages. Make sure that your recipient knows the message is from your company. This applies even if you are a company of ONE.
- **Analyze.** Once you've set goals to implement your customer service systems, create a plan to assess those goals and your new systems. Evaluate success and make changes to improve your business and customer service.

Creating Your Documentation

- **Make an FAQ Page.** Write down all of the potential questions a visitor or customer might have about your products or services when they come to your website. Write down all of the questions you receive on a consistent basis. Answer the questions and publish on your site. Make sure that your visitors and customers are aware of the FAQ page.
- **Document your policies.** What are your business policies? Consider creating a privacy policy, guarantees, returns and any other relevant documents. Talk to your attorney to make sure you're covering all your bases. Then publish your policies on your website and make sure they're easy to find.
- **Add your contact form.** Choose a contact form that works best for your website technology and your needs. Add it to your website so that questions can quickly be addressed. You might link to it from your FAQ page as well.
- **Create your Standard Operating Procedures [SOP's].** For each task in your customer service system, create a standard operating system. Share the documentation with your support and customer service team.

Customer service is an important and ongoing process. Use this checklist to work through your customer service plan from beginning to end and to keep track of everything you need to do to create an exceptional customer experience.

Point of View

Many business owners understand the need to implement these steps and strategies in their business, but find that they get overwhelmed with the daily tasks connected with operating their business. As a result, these strategies and systems very rarely 'get off the ground.' If they do, there's lack of consistency, which creates a negative perception of your brand.

Let's schedule a 30-minute complimentary session to discover which strategies you can get started with as soon as possible. You will leave the call with a plan achieve your goals in the short term. Here is a link to my calendar:

<https://calendly.com/yvonne-6>

Please select a time between 1:00 and 4:00 pm on Tuesdays and Thursdays ONLY.

I hope you will see the value in keeping this Checklist handy so you can use it as a Guide in creating your Standard Operating Procedures (SOP's) for your Customer Service Systems and related Documentation.

Yvonne A Jones

About Yvonne A Jones

Yvonne A Jones is a Relationship Marketing Strategist | Personal Business Coach|Best-Selling Author | International Speaker.

She is Founder of My Success Circle Marketing – an umbrella company for various businesses including Consulting, Coaching and Mentoring, Identity Theft protection, and an online Health & Wellness Shopping Club.

Yvonne specializes in working with highly-motivated female entrepreneurs 50 and Wiser, as well as organizations with 10 or more employees to help them develop systems to WOW their customers and create memorable experiences.



Yvonne was mentioned on HuffingtonPost.com as one of the "Top 100 Most Social Customer Service Pros on Twitter to Follow" and on GetApp.com as "One of the Top 15 Most Influential Customer Service Experts to Follow on Twitter."

She is Alignable's 2018 Small Business Person of the Year for Stuart, Florida.

When she's not working she's either gardening, reading, listening to music, doing Story Time with her grandchildren on Zoom, or doing Bible Study.

Websites:

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Claim your copy of "Relationship Marketing: Key to Small Business Success" at:
<https://50andwisercoaching.com/smallbizsuccess>

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Thank You

