

# Customer Service Excellence — Workbook

This workbook turns the course into a working service system for your own business. Work through one section per module: write your service vision and standards, build a complaint-recovery playbook, plan how you will hire and coach your front line, and stand up a real NPS, CSAT, and CES measurement loop. By the end you will have documented standards, a recovery script, a training plan, and a live dashboard you can put in front of your team this month.

## The Case for Service and Setting Standards

Define the experience you promise and convert it into explicit, observable standards your team can deliver.

### Worksheet: Your Service Vision and Standards

Draft a one or two line service vision, then convert each thing you care about into an observable behavior with a specific time or rule. Keep it to one page.

Service vision (1-2 lines)

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Greeting standard (channel and timeframe)

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Phone / email / chat response time targets

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Tone rules: words we always use

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Trigger phrases we never use

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Ownership rule (who owns the problem until resolved)

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Front-line spending / make-it-right authority limit

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### Worksheet: SERVQUAL Gap Self-Assessment

Rate your business 1 to 5 on each SERVQUAL dimension, then note the single most likely reason customers would be disappointed on each. Be honest; reliability is usually the weakest.

Reliability score (1-5) and biggest gap

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Responsiveness score (1-5) and biggest gap

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Assurance score (1-5) and biggest gap

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Empathy score (1-5) and biggest gap

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Tangibles score (1-5) and biggest gap

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Lowest-scoring dimension to fix first

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### Exercise: Map Your Two Core Customer Personas

For your two or three main customer types, sketch what they value, what frustrates them, and what would delight them, using your own reviews and front-line input as evidence.

- Who are your two main customer types, and how do their expectations differ?

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- What do your reviews and staff say customers complain about and ask for most?

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- Where do your current standards fail to match what these customers actually expect?

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### Checklist: Standards Foundation Ready

- Written a one or two line service vision the team can act on
- Converted each value into an observable, time-bound standard
- Defined a clear front-line make-it-right authority limit
- Scored the business on all five SERVQUAL dimensions
- Identified the weakest dimension to improve first
- Captured standards on a single page the team can remember

## Handling Complaints and Service Recovery

Build a repeatable recovery process, de-escalation skills, and a system that turns complaints into permanent fixes.

### Exercise: Write Your Complaint-Recovery Script

Using the LAST or HEARD framework, write the actual words and steps your team will use, plus the pre-approved goodwill gestures for common failures.

- What is your opening line that makes a complaining customer feel heard?

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- What sincere apology and ownership language will you use, avoiding the non-apology?

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- What goodwill gesture is pre-approved for each of your three most common failures?

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### Worksheet: De-escalation Quick Reference

Fill this in as a wallet-card or screen reference for staff facing an angry customer, so the right moves are available under pressure.

First move when a customer is angry (before solving)

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Calming phrases that acknowledge the feeling

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Trigger phrases to avoid

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Us-versus-the-problem reframe line

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Boundary statement if a customer becomes abusive

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When and how to escalate to a manager

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### Worksheet: Complaint Root-Cause Log Setup

Define the fields you will capture for every complaint and run the five-whys on your single most frequent complaint to find its real cause.

Complaint categories you will track

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Channels you will log (phone, email, chat, in person, reviews)

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Most frequent complaint right now

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Five-whys chain to its root cause

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Standard or SOP to change to prevent recurrence

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Owner and review cadence for the log

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### Checklist: Recovery System Set Up

- Documented a step-by-step recovery script using LAST or HEARD
- Pre-approved goodwill gestures for common failures
- Created a de-escalation quick reference for staff
- Made it easy to complain across multiple channels
- Stood up a complaint log with categories and channels
- Ran a five-whys analysis on the top complaint and assigned a fix

## Building a Service Culture and Front-Line Team

Hire for service aptitude, train and coach against your standards, and recognize the behavior you want repeated.

### Worksheet: Service Hiring Scorecard

Define the service traits you will select for and the behavioral questions you will ask, so hiring is consistent rather than gut feel.

Core service traits to screen for

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Behavioral question on going out of the way for a customer

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Behavioral question on handling a difficult customer

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Behavioral question on owning a mistake

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Green flags in answers

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Red flags in answers

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### Exercise: Design a First-Week Onboarding Plan

Plan how a new front-line hire learns the experience you deliver before product minutiae, including who they shadow and what authority they get.

- What will the new hire learn about the vision and standards on day one?

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- Who is your strongest performer for them to shadow, and for how long?

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- What make-it-right authority will they have, and how will you communicate it?

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### Exercise: Build a Role-Play Training Set

Write three realistic difficult-customer scenarios your team will rehearse, with a debrief focus for each.

- What three hard scenarios most need rehearsing in your business?

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- What does a strong response to each look like against your standards?

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- How often will you run role-play and one-on-one coaching, and who leads it?

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### Checklist: Service Culture in Place

- Built a hiring scorecard with behavioral questions
- Created a structured first-week onboarding into the standards
- Paired new hires with the strongest performers to shadow
- Wrote role-play scenarios for the hardest interactions
- Scheduled recurring coaching one-on-ones tied to metrics
- Set up a way to recognize and share great service publicly

## Measuring Service and Sustaining the Advantage

Stand up NPS, CSAT, and CES, build a closed feedback loop, and map the journey to keep improving.

### Worksheet: Your Service Measurement Plan

Decide which metric fires at which moment, the exact question, and where the result goes. Match CSAT and CES to touchpoints and NPS to a periodic pulse.

CSAT: question, touchpoint, and timing

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CES: question and which experiences it follows

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NPS: question and how often you run it

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Survey tool or platform you will use

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Who watches the results and how often

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Targets and baseline for each metric

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## Exercise: Stand Up the Closed Feedback Loop

Define both the inner loop (follow up with the customer) and the outer loop (fix the root cause), including who owns each and how fast.

- Who contacts a detractor or low-score customer, and within what time window?

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• How will you tag comments so themes become visible across many responses?

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- Which review meeting picks the top systemic issue to fix each period?
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## Worksheet: Customer Journey Map

Lay out your stages and touchpoints, mark the emotion and friction at each, and flag the moments of truth that most shape loyalty.

Journey stages (awareness to repeat/renewal)

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Key touchpoints at each stage

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Where customers feel delighted vs frustrated

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Hand-offs where customers get dropped

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Moments of truth to make excellent first

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Top friction point to fix this quarter

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## Checklist: Measurement and Loops Live

- Chose NPS, CSAT, and CES placements across the journey
- Set baselines and targets for each metric
- Configured a survey tool that routes results to an owner
- Assigned detractor follow-up within a defined window
- Built a service dashboard tracked over time and by segment
- Mapped the journey and set a monthly review of scores and comments

## Your Action Plan

1. Week 1: Write your service vision and convert your values into one page of observable standards.
2. Week 1: Score your business on the five SERVQUAL dimensions and pick the weakest to fix first.
3. Week 2: Write your LAST or HEARD recovery script and pre-approve goodwill gestures for common failures.
4. Week 2: Stand up a complaint log and run a five-whys on your most frequent complaint.
5. Week 3: Build your hiring scorecard and a structured first-week onboarding into the standards.
6. Week 3: Write three role-play scenarios and schedule recurring coaching one-on-ones.
7. Week 4: Choose your NPS, CSAT, and CES questions and placements and configure a survey tool.
8. Week 4: Define the inner and outer feedback loops and assign detractor follow-up within 48 hours.
9. Week 5: Build a service dashboard with baselines and review scores plus a sample of

comments.

10. Week 6: Map the customer journey, fix the top friction point, and set a monthly service review day.











