

APPENDIX D

# CUSTOMER EXPERIENCE CHECKLIST

**A** PRACTICAL TOOL for delivering consistent, memorable, emotionally grounded service.

Use this checklist weekly or after key interactions. This tool reflects the lessons from Chapter 12—customer experience is emotional, immediate, and shaped by leadership. Your goal is simple: make every customer feel valued, understood, and cared for.

## *First Impressions & Environment*

- Location was clean and inviting
- Signage and counters were tidy
- Staff appearance reflected professionalism
- Customers were acknowledged quickly

## *Communication & Tone*

- Staff spoke clearly and respectfully
- Body language was open and welcoming
- Questions were answered patiently
- No dismissive or rushed tone

### *Listening & Understanding*

- Staff listened fully before responding
- Restated customer needs for accuracy
- Did not interrupt
- Demonstrated empathy

### *The One Chance Moment*

- Customer felt seen and valued
- Response was quick enough
- Recovery was handled gracefully
- Problem became an opportunity for trust
- Interaction felt important to the customer

### *Service Delivery & Follow-Through*

- Service matched what was promised
- Next steps were explained clearly
- Issues handled promptly and calmly
- No blame or excuses

### *Customer Emotions*

- Customer left feeling heard and respected
- Staff de-escalated emotional customers
- Noticed signs of frustration and addressed them
- Final impression created trust

### *Internal Customer Experience*

- Team felt supported by leadership
- Staff received clear expectations
- Feedback was kind and constructive
- Tone matched the experience we expect for customers
- Staff had tools and training needed

### *Leadership Patterns & Coaching*

- Positive or negative pattern emerged
- Staff member demonstrated excellence
- Coaching moment identified for follow-up
- Leadership actions aligned with culture

## LEADERSHIP REVIEW AND COACHING GUIDE

### *I. Patterns, Strengths, and Gaps*

What went well this month:

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Where did we fall short:

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Patterns I am noticing:

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## 2. *Customer Feedback Review*

Three positive comments customers expressed:

1.

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2.

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3.

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Three concerns or complaints:

1.

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2.

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3.

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What adjustments can we make immediately?

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### 3. *Team Development*

Which staff members consistently deliver excellent service?

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Who needs coaching or support?

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What training or reminders will help the whole team?

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### 4. *Leadership Commitment*

One improvement I will implement this week:

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One habit I will reinforce with my team:

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Customer Experience Alignment Statement:

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