



CREATING REMARKABLE CLIENT EXPERIENCES

## Customer Experience Marketing – My Business Assessment

### Instructions

Take this assessment to evaluate your business relative to the three pillars of Customer Experience Marketing. Respond as honestly as possible as this will allow you to accurately identify potential areas of development.

Use the scale below to indicate how each statement applies to your business. Choose the number that best applies to each statement and record it in the box to the right of the statement. Then total your scores for each of the three pillars.

**RATING SCALE:** 3 = Usually, 2 = Sometimes, 1 = Rarely



### People

CXM is built on a foundation of *People* who deliver memorable customer service experiences. Hiring the right *People* is vitally important. But with the right training, most employees can be developed to remarkable status.

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|--|--------|
| 1. My business offers customer service specific training to new employees.                 | SCORE: |
| 2. My business provides ongoing training to existing employees.                            | SCORE: |
| 3. My business teaches employees to adequately discover the needs of customers.            | SCORE: |
| 4. My business educates employees how to deliver exactly what customers request.           | SCORE: |
| 5. My business allows employees to go the extra mile and exceed expectations of customers. | SCORE: |
| 6. My business trains employees how to resolve customer complaints.                        | SCORE: |
| 7. My business empowers employees to solve a customer's problem without a manager.         | SCORE: |
| 8. My business facilitates regular opportunities for employees to learn from one another.  | SCORE: |

**TOTAL PEOPLE SCORE:**

### Process

CXM is supported by *Processes* that build repeatable customer service experiences. *Processes* should enable your *People* to exceed expectations (and fix problems) again and again.

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| 9. My business understands what motivates employees (besides money).                         | SCORE: |
| 10. My business ensures all employees receive consistent customer service training.          | SCORE: |
| 11. My business leverages processes that promote repeatable customer experiences.            | SCORE: |
| 12. My business measures the service performance of each employee.                           | SCORE: |
| 13. My business rewards employees for delivering excellent customer service experiences.     | SCORE: |
| 14. My business utilizes a physical layout that makes it easier to serve customers.          | SCORE: |
| 15. My business provides employees with the tools and technology they need to be remarkable. | SCORE: |
| 16. My business regularly evaluates systems and processes to improve efficiency.             | SCORE: |

**TOTAL PROCESS SCORE:**

## Promotion

CXM is sustained by organic *Promotion*. Retained customers who refer new customers are the most effective way to grow business. Intentional customer *Promotion* generates positive personal recommendations.

17. My business is acquainted with current multipliers (loyal customers/fans/promoters).	SCORE:
18. My business understands what message they want a multiplier to give in a referral.	SCORE:
19. My business educates current multipliers on when to give a referral.	SCORE:
20. My business knows where a referral should occur (social media, in-person, review sites, etc.).	SCORE:
21. My business recognizes why multipliers give referrals.	SCORE:
22. My business trains employees on how to request referrals from multipliers.	SCORE:
23. My business identifies potential customers that could be referred.	SCORE:
24. My business regularly measures the effectiveness of promotions.	SCORE:

**TOTAL PROMOTION SCORE:**

## Scoring

Remember, the purpose of this tool is to help you explore and assess how you are currently utilizing the three pillars of Customer Experience Marketing. The standards for “remarkable” are high. Many organizations will score high on at least one pillar. Few score high on all three.

**A total score of 24 – 20** (on any pillar) is an indication that the pillar is a potential strength.

**A total score of 19 – 13** (on any pillar) is an indication that your organization likely has work to do around that pillar to become remarkable.

**A total score of 12 or lower** (on any pillar) is an indication that you need improvement around that pillar to become remarkable.

Finally, keep in mind that while this tool is quantitative, the real value will be found in the qualitative—elevating customer service experiences. Don’t focus on the numbers, but rather the concepts and individual statements where you may have scored low.

## Putting it all together

When *People*, *Processes*, and *Promotions* are maximized and aligned, you deliver remarkable customer service experiences—experiences that customers remember, repeat, and recommend. When optimized, Customer Experience Marketing becomes the most powerful attraction, sales, and retention engine in your organization. Customers don’t just *TELL* people about your business; they *SELL* people about your business.

### ABOUT JESSE B GOOD

*Jesse B Good helps organizations multiply loyal customer relationships. For 20+ years, he has led front-line customer service and CX teams in hospitality, restaurants, entertainment, and retail—allowing him to facilitate more than one million customer service experiences. As a speaker, trainer, and consultant, Jesse has helped businesses create millions of dollars in additional business revenue through retained customers, expanded relationships, and cost avoidance.*

