

The Service Excellence Toolkit

Purpose of the Service Excellence Toolkit

The Service Excellence Toolkit is to be used by managers and employees in an organisation for the assessment of the performance of the organisation. The toolkit takes **customer service excellence** as its main theme, because today service excellence is the most critical factor for the success of many business organisations.

The toolkit enables managers and employees to identify:

- **organisational performance** showing how well the organisation delivers service excellence
- **service excellence gaps** within the organisation which are acting as obstacles to achieving service excellence
- **improvement actions** which need to be taken to fill the service excellence gaps
- **improvement progress** towards the planned improvement actions

The Service Excellence Toolkit draws upon examples of best practice in customer service in small, medium and large organisations. Although the focus is on excellence in customer service, customer service cannot be sustained as a standalone activity. Rather, service excellence depends on the wider activities of the organisation, with linkages to the organisation's **leadership, people** and **systems**. These aspects are essential pre-requisites of outstanding customer service.

Structure of the Service Excellence Toolkit

The emphasis of the Service Excellence Toolkit is simplicity, and will not therefore require any lengthy period of training for those who use it for assessment of organisational service excellence.

The Toolkit is based around four key **service perspectives**. These are shown below, with the relative weighting of each in brackets:

- **Leadership** (20%)
- **People** (20%)
- **Systems** (20%)
- **Customers** (40%)

Leadership, people and systems are aspects of the organisation which must be in place to support the goal of service excellence. Within each service perspective there are three **service attributes** which contribute to **organisational aims**.

The four service perspectives are shown on the next page.

The Service Perspectives

SERVICE PERSPECTIVE 1: LEADERSHIP

WEIGHTING 20%

SERVICE ATTRIBUTES		ORGANISATIONAL AIMS
1.1	Leaders develop effective goals and strategies	Leaders develop effective organisational goals and customer service strategies. Leaders are personally involved in their communication and implementation throughout the organisation.
1.2	Leaders communicate goals and strategies	
1.3	The organisation implements its strategies	

SERVICE PERSPECTIVE 2: PEOPLE

WEIGHTING 20%

SERVICE ATTRIBUTES		ORGANISATIONAL AIMS
2.1	Internal people are recognised and rewarded	The organisation empowers its people to deliver the promise to its customers through reward, recognition, involvement, development and care on an individual basis.
2.2	Internal people are empowered	
2.3	Internal people respond positively to customers' expectations	

SERVICE PERSPECTIVE 3: SYSTEMS

WEIGHTING 20%

SERVICE ATTRIBUTES		ORGANISATIONAL AIMS
3.1	The organisation has processes which support its people	The organisation's systems and processes support its people in delivering the promise to its customers. Responsiveness and innovation are embedded into the organisation.
3.2	The organisation innovates as a response to customer and business changes	
3.3	The organisation measures and reflects on performance in order to improve	

SERVICE PERSPECTIVE 4: CUSTOMERS

WEIGHTING 40%

SERVICE ATTRIBUTES		ORGANISATIONAL AIMS
4.1	The organisation meets and attempts to exceed customer expectations of products and services	Throughout the organisation people strive to discover, meet and exceed the individual expectations of its customers. Long-lasting customer relationships are built and maintained.
4.2	The organisation promotes a positive image to customers	
4.3	The organisation develops effective customer relationships	

Assessment and scoring

Each of the service attributes within the four service perspectives is assessed within the organisation. It is recommended that the assessment is carried out by **focus group**.

Assessment by focus group

A focus groups within the organisation may be used in order to assess the organisation's service performance using the four service perspectives. The make-up of the focus group should provide a balance of the different departments and locations within the organisation, and also an appropriate proportion of staff and managers at different levels. All parts of the organisation should be represented in the focus group.

Members of focus group will need to familiarise themselves with the principles of the Service Excellence Toolkit. However, one of the aims of this form of organisational assessment is its simplicity, and so training sessions are not required.

Your focus group will need to score each of the three service attributes within each of the four service perspectives, making twelve scores in all. The scores should be allocated on a scale of 0 to 10 by using the **Service Excellence Self-scoring System** shown in the table below. Evidence is required for each service attribute (and **scoring forms** for evidence references are given on the following pages). Recording the evidence for each item encourages your team to be objective and follows good practice for internal and external auditing of the organisation's self-assessments.

SERVICE EXCELLENCE SELF-SCORING SYSTEM		
	Observation	Score
PLAN	There is no evidence (or anecdotal evidence only) of plans for addressing the service attribute.	0
	Evidence shows plans to address the service attribute in the next business planning phase.	1
	Evidence shows that the service attribute is being addressed in the current business planning phase.	2
IMPLEMENT	Evidence shows that the service attribute has been implemented in some areas of the organisation.	3
	Evidence shows that the service attribute has been implemented in the majority of the organisation.	4
	Evidence shows that the service attribute has been implemented in the majority of the organisation and success measures have been identified.	5
EMBED	Evidence shows that the service attribute is becoming embedded across the organisation.	6
	Evidence shows that the service attribute is fully embedded across the organisation.	7
	Evidence shows that the service attribute is fully embedded across the organisation and success measures are being monitored.	8
	Evidence shows that the organisation is learning from measuring the service attribute and is implementing improvement opportunities.	9
	Evidence shows that the organisation is considered best practice for the service attribute	10

Service excellence questionnaire

If you wish you may use the questionnaire on the following page to help your focus group assess the business within the customer perspective of the toolkit.

Alternatively, design your own questionnaire to suit your specific business. It will still be useful to base the questions around those within the service excellence toolkit.

SERVICE EXCELLENCE QUESTIONNAIRE: CUSTOMERS

Please help us to review and improve our service

How to complete the questionnaire:

Give each statement a score from 0 to 10, where 0 means you do not think the statement is true at all; 10 means you are completely confident the statement is true

QUESTIONS FOR CUSTOMERS

	SCORE 0 to 10
1. The organisation delivers its promises to its customers and strives to exceed customer expectations	
2. The organisation's physical resources (such as premises, equipment, staff and literature) are excellent	
3. The staff of the organisation are keen to respond quickly when a customer needs help	
4. Customers are dealt with in a friendly, professional manner and receive individual attention when it is needed from knowledgeable staff	
5. If something is wrong, it is worthwhile making a complaint because it will be dealt with quickly and effectively	
6. Customers will tend to stay loyal to the organisation, due to service excellence	

Thank you for completing the questionnaire

SERVICE EXCELLENCE SELF-SCORING FORMS

SERVICE PERSPECTIVE 1: LEADERSHIP

SERVICE ATTRIBUTES		ORGANISATIONAL AIMS
1.1	Leaders develop effective goals and strategies	Leaders develop effective organisational goals and customer service strategies. Leaders are personally involved in their communication and implementation throughout the organisation.

Description of Evidence:	Score

Action Plan:

Actions	Person	Deadline	Update

SERVICE PERSPECTIVE 1: LEADERSHIP

SERVICE ATTRIBUTES		ORGANISATIONAL AIMS
1.2	Leaders communicate goals and strategies	Leaders develop effective organisational goals and customer service strategies. Leaders are personally involved in their communication and implementation throughout the organisation.

Description of Evidence:	Score

Action Plan:

Actions	Person	Deadline	Update

SERVICE EXCELLENCE SELF-SCORING FORMS

SERVICE PERSPECTIVE 1: LEADERSHIP

SERVICE ATTRIBUTES		ORGANISATIONAL AIMS
		Leaders develop effective organisational goals and customer service strategies. Leaders are personally involved in their communication and implementation throughout the organisation.
1.3	The organisation implements its strategies	

Description of Evidence:	Score

Action Plan:

Actions	Person	Deadline	Update

SERVICE PERSPECTIVE 2: PEOPLE

SERVICE ATTRIBUTES		ORGANISATIONAL AIMS
2.1	Internal people are recognised and rewarded	The organisation empowers its people to deliver the promise to its customers through reward, recognition, involvement, development and care on an individual basis.

Description of Evidence:	Score

Action Plan:

Actions	Person	Deadline	Update

SERVICE EXCELLENCE SELF-SCORING FORMS

SERVICE PERSPECTIVE 2: PEOPLE

SERVICE ATTRIBUTES		ORGANISATIONAL AIMS
2.2	Internal people are empowered	The organisation empowers its people to deliver the promise to its customers through reward, recognition, involvement, development and care on an individual basis.

Description of Evidence:	Score

Action Plan:

Actions	Person	Deadline	Update

SERVICE PERSPECTIVE 2: PEOPLE

SERVICE ATTRIBUTES		ORGANISATIONAL AIMS
2.3	Internal people respond positively to customers' expectations	The organisation empowers its people to deliver the promise to its customers through reward, recognition, involvement, development and care on an individual basis.

Description of Evidence:	Score

Action Plan:

Actions	Person	Deadline	Update

SERVICE EXCELLENCE SELF-SCORING FORMS

SERVICE PERSPECTIVE 3: SYSTEMS

SERVICE ATTRIBUTES		ORGANISATIONAL AIMS
3.1	The organisation has processes which support its people	The organisation's systems and processes support its people in delivering the promise to its customers. Responsiveness and innovation are embedded into the organisation.

Description of Evidence:	Score

Action Plan:

Actions	Person	Deadline	Update

SERVICE PERSPECTIVE 3: SYSTEMS

SERVICE ATTRIBUTES		ORGANISATIONAL AIMS
3.2	The organisation innovates as a response to customer and business changes	The organisation's systems and processes support its people in delivering the promise to its customers. Responsiveness and innovation are embedded into the organisation.

Description of Evidence:	Score

Action Plan:

Actions	Person	Deadline	Update

SERVICE EXCELLENCE SELF-SCORING FORMS

SERVICE PERSPECTIVE 3: SYSTEMS

SERVICE ATTRIBUTES		ORGANISATIONAL AIMS
		The organisation's systems and processes support its people in delivering the promise to its customers. Responsiveness and innovation are embedded into the organisation.
3.3	The organisation measures and reflects on performance in order to improve	

Description of Evidence:	Score

Action Plan:

Actions	Person	Deadline	Update

SERVICE PERSPECTIVE 4: CUSTOMERS

SERVICE ATTRIBUTES		ORGANISATIONAL AIMS
4.1	The organisation meets and attempt to exceed customer expectations of products and services	Throughout the organisation people strive to discover, meet and exceed the individual expectations of its customers. Long-lasting customer relationships are built and maintained.

Description of Evidence:	Score

Action Plan:

Actions	Person	Deadline	Update

SERVICE EXCELLENCE SELF-SCORING FORMS

SERVICE PERSPECTIVE 4: CUSTOMERS

SERVICE ATTRIBUTES		ORGANISATIONAL AIMS
4.2	The organisation promotes a positive image to customers	Throughout the organisation people strive to discover, meet and exceed the individual expectations of its customers. Long-lasting customer relationships are built and maintained.

Description of Evidence:	Score

Action Plan:

Actions	Person	Deadline	Update

SERVICE PERSPECTIVE 4: CUSTOMERS

SERVICE ATTRIBUTES		ORGANISATIONAL AIMS
4.3	The organisation develops effective customer relationships	Throughout the organisation people strive to discover, meet and exceed the individual expectations of its customers. Long-lasting customer relationships are built and maintained.

Description of Evidence:	Score

Action Plan:

Actions	Person	Deadline	Update