

# Quest 2 – Customer Journey

## Guidance Notes



Module Outcome					
There is a customer focused culture in the facility with commitment throughout the organisation to continually improve.					
The facility understands its customer base and through consultation can measure the outcomes of the service.					
The facility can demonstrate strong customer loyalty as well as the ability to attract new custom using recommendations by existing patrons.					
Customers participate in a friendly, welcoming, and safe environment.					
Customer satisfaction improves each year.					
Focal Points - Questions to consider in preparation for your Quest Assessment					
Does the facility measure retention, attrition, and yield per member/customer?					
Is the Customer journey documented or mapped out, and all staff have been trained on their role in this journey?					
Does the facility complete Customer Surveys?					
Does the facility use google analytics or another tool to monitor engagement on their website or social media?					
Do you measure what percentage of your planned program was delivered?					
Mystery Visit					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
<b>Was the interaction with the team positive and enthusiastic?</b>	It is unlikely customers will want to visit the facility again.	Some members portray a positive and engaging attitude.	The team are happy to be at work and interact with customers.	There is a clear commitment by the team to deliver customer service standards.	Team members have an efficient, positive, proactive approach to customer care with a friendly atmosphere throughout.
	There was no attempt by staff to create rapport or interact with the customers.	It is likely that customers will not be discouraged to visit the facility again.	There is evidence of staff proactively engaging with customers to enhance their overall experience and enjoyment.	The team are happy to be at work and interact with customers. They are apologetic if there is an issue.	There is a consistently high level of customer care throughout the visit.

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Mystery Visit					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
	There is very limited evidence of the facility meeting minimal standards of customer care.	There is evidence of a customer care system being in place, however significant areas of improvement have been noted.	Opportunities for improvement have been identified in the consistency of delivery.	Customers are very likely to visit the facility again.	There is a positive atmosphere in the facility, making it a friendly place to visit.  It is highly likely that customers will recommend others to visit the facility.
<b>Were the team knowledgeable and informative?</b>	Team members lack knowledge about the facility and its activities.	<p>The knowledge of the team requires them to regularly ask other team members for information.</p> <p>Staff were unable to articulate or explain the information provided by on site literature (promotional leaflets, new activities etc.)</p> <p>Several areas for improvement have been identified.</p>	<p>The team were able to provide basic knowledge of the core products available (gym, swim, classes, court hire).</p> <p>Where staff did not have the information readily to hand, contact details were taken so that information could be provided at a later point in time.</p>	<p>The team have a good knowledge of a wide range of products and services.</p> <p>Based on their knowledge some of the staff are able to provide recommendations or advice to customers.</p> <p>A concierge service is provided.</p>	<p>Comprehensive and bespoke information is provided by staff within the customer visit to enhance overall experience.</p> <p>Staff are well trained and knowledgeable of all products and services available.</p> <p>Staff are able to provide quality advice to enhance individuals' users experience of the facility.</p>

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Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
<b>Are enquiries and feedback made via the website or social media positively dealt with?</b>	There is limited opportunity to make an enquiry online or enquiries have not been responded to.	<p>Enquiries have been responded to, however there was a significant delay in response time.</p> <p>There are limited methods online to contact the facility and/or it is difficult to find information about how to make a comment.</p> <p>The response to the enquiry is partially answered or the incorrect information was provided affecting the visit experience.</p>	<p>Enquiries have been responded to with a reasonable timeframe.</p> <p>There are different methods to contact the facility online which can be easily found.</p> <p>The enquiry was responded to providing the information required.</p>	<p>There was a considered response to all enquires within a good timeframe.</p> <p>There are a variety of methods to contact the facility online.</p>	<p>There was a comprehensive response to all enquires within a fast timeframe.</p> <p>Where appropriate the enquiry is followed up by the facility with other information provided.</p>
<b>Are enquiries made by telephone positively dealt with?</b>	<p>It is very difficult to contact the facility by telephone.</p> <p>Most calls were not answered.</p>	<p>Calls were consistently not answered within a reasonable timeframe.</p> <p>Calls were answered using a basic level of customer care.</p>	<p>Some calls were answered within a reasonable timeframe.</p> <p>The information required was provided.</p>	<p>Most calls were answered within a reasonable timeframe.</p> <p>Information required was provided in a concise articulate way.</p>	<p>All calls were answered within a reasonable timeframe.</p> <p>Any automatic response system works to meet the customer's needs.</p>

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Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
		Some information was provided about the initial enquiry.	The call was answered in a professional manner with the correct information given.	Staff were friendly and professional.	The team provides proactive relevant information without hesitation. A comprehensive response was provided to all enquiries.  Follow up contact made if required.
<b>Are the facility social media sites up to date with relevant and engaging information?</b>	Unable to find or access the social media site.	Able to find the social media site	Social media was very easy to locate.	Social media was very easy to locate and all links working, platform easy to navigate.	Social media was very easy to locate, all links working, platform very easy to navigate, good use of images, videos available to view current activities.
	The page had not been updated in over 3 months.	The page had not been updated in 1 month.  Posts are impersonable and only linked to membership offers or "out of order" facilities.	Updated within the last month.  Consistent branding used when compared to the website.	Good use of images and videos available to view current activities and programming.  Basic product, pricing and timetable information was provided in recent posts.	Detailed product, pricing and timetable information was provided in recent posts.  The images used on the site are reflective of the community.

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Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
		Some of the links were not working.		Good use of branding and images available on the site.  Clear accessibility information	Recent testimonials or evidence of users attending events at the site.  Evidence of quality engagement through questionnaires and feedback.
<b>Customer information is easily available and well-presented inside, and where applicable outside the facility.</b>	Limited information is provided around the facility causing issues finding areas or essential information.	Adequate directional signage is in place around the premises.  Overall statutory information is provided throughout the facility.  Basic customer focused information is provided.	Well-presented correct directional signage is in place around the premises.  Most information is professionally displayed, providing relevant information about key activities taking place at the facility.  The facility has made it clear how customers can provide feedback.	Well-presented correct directional signage is in place around the premises.  Information is professionally displayed, easy to find, and mostly up to date.  Customer feedback is fed back to stakeholders.	All information is professionally displayed and up to date.  There is a strong corporate brand image throughout the facility. Multi-media is effectively used.  A 'less is more' approach has been taken, whilst ensuring information can be easily obtained.
<b>When you visit the facility for the first time, do they capture your personal information?</b>	No data capture requested.	Name and preferred method of communication are requested on or prior to your first visit	Information about "loyalty" schemes and membership options are readily available and promoted within the facility.	Promotions and loyalty schemes are in place that require individuals to provide contact information to the facility.	Comprehensive personal contact details are requested and recorded on the inhouse membership system.

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		<p>Information about "loyalty" schemes are readily available upon request within the facility.</p> <p>Can access the facility by declining to provide personal information.</p>		<p>Incentives and discounts are available linked to the provision of personal data.</p> <p>Facility staff understand and can readily explain why they are requesting personal data.</p>	<p>Facility actively provides "contact us" information requesting if the users have any additional support or accessibility needs.</p> <p>Staff are trained to request the communication preferences of the users so that a better service can be provided.</p>
<b>Are team members well-presented and visible?</b>	<p>Supervision levels at the facility are low.</p> <p>It is difficult to distinguish who is a member of the team.</p>	<p>Some team members are appropriately dressed for their role.</p> <p>Team presence during the visit in key areas is evident.</p>	<p>Most team members are professionally presented.</p> <p>Team members are well positioned throughout the facility to help support the delivery of customer care and standards.</p>	<p>All team members are professionally presented.</p> <p>There is a high presence of team members both inside and outside the facility.</p>	<p>All team members are professionally presented.</p> <p>There is a high presence of team members, and they actively try to engage with customers.</p>
Plan					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
<b>How do you plan to ensure that all customer's expectations are met?</b>	There is limited evidence as to how the facility plans for customer service excellence.	The facility can evidence a basic documented commitment towards delivering customer service.	Customer service standards are clearly communicated with members of the public.	The facility has set challenging and stretching targets for customer satisfaction.	Customer service plans are fully integrated into the values and ethos of the business.

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Plan					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
	There is limited evidence as to how the facility plans to engage with their current customer base.	<p>Front facing staff are inducted and receive training on customer service.</p> <p>The facility has a customer feedback system in place but there are many areas for improvement.</p>	<p>All staff receive job specific training on service delivery and standards.</p> <p>The Customer journey is documented or mapped out, and all staff have been trained on their role in this journey.</p>	<p>Detailed research plans are in place.</p> <p>Competitive analysis is in place to ensure products are on trend.</p> <p>Staffing performance is reviewed and feedback from customers is actively sought on a regular basis.</p> <p>The facility complete Customer Surveys and analyses their results to feedback into the facilities plans and procedures.</p>	<p>All products and services are reviewed on an annual basis to monitor customer satisfaction levels.</p> <p>The facility has a social media strategy that actively seeks customer feedback.</p> <p>Customer service champions are in place who conduct service reviews and training with the staff.</p> <p>Innovative technologies are embedded into the customer retention strategy.</p> <p>Marketing strategies have been designed using staff and customer feedback to support the customer service charter and linked policies.</p>

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Do					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
<b>How do you ensure that team members are trained to exceed customer expectations?</b>	<p>Training on meeting customer expectations is not in place.</p> <p>Team members are given none, or very basic information on customer care.</p> <p>No Budget assigned for any ongoing staff training and development.</p>	<p>Some training had been carried out however this is limited.</p> <p>Team members are aware of the ways that customers can give feedback.</p> <p>There are further opportunities for improvement.</p>	<p>Team members strive to exceed customer expectations and are generally aware of good practice.</p> <p>Procedures are in place to ensure that the front of house team carry out tasks in a consistent and effective manner.</p> <p>Apprentices are fully trained and used to support key front-facing areas of the business.</p>	<p>There are good systems and processes in place for meeting customer expectations. Promise less and deliver more is evident.</p> <p>Team members are multiskilled and there is evidence of ongoing staff development.</p> <p>Both Volunteers and Apprentices are fully trained and used to support key front-facing areas of the business.</p>	<p>Customer care training is in place, training records show that team members have been trained.</p> <p>Training includes competency testing.</p> <p>Team members are seen interacting with customers championing standards.</p>
<b>Has the facility got suitable and sufficient staffing, equipment, and space to deliver excellent customer service?</b>	<p>There is limited evidence of resources being allocated to ensure customer service standards meet the minimal standards.</p>	<p>There are enough resources for the facility to respond to normal footfall.</p> <p>Multiple areas for improvement have been identified.</p>	<p>Staff resources are matched to the programming needs and usage targets.</p> <p>Capacity and program levels are monitored, clearly communicated, and linked to equipment purchases.</p>	<p>Equipment levels are monitored and linked to an equipment replacement plan and service improvement plan.</p> <p>Waiting list for products and activities are monitored and impact on changes to service plans.</p>	<p>Latent demand, capacity levels and waiting lists are actively used to forecast future programming and equipment needs.</p> <p>Best available technologies are being used to manage the customer experience.</p>



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Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
		Customer service levels could increase by making some improvements.	Basic stock counts and minimum levels of equipment have been set and communicated to the staff.	Staff levels are monitored and responsive to changes in demand.  Usage levels of each area of monitored and programming is adapted to maximise dead space.	The facility has a detailed staffing level plan linked to programming, seasonal changes and training needs.  The facility has a comprehensive audit and feedback service linked to its customer service policy and procedures.
<b>How do you use and communicate your findings in relation to improving the service for both customers and staff?</b>	There is limited evidence of processes to demonstrate that there is a commitment to improving customer service.  There may be some ad-hoc informal feedback in place	Some feedback is gathered and reviewed although this may be limited.  There is some communication of findings to inform plans.	Customer feedback is gathered and shared with staff and customers.  Some customer satisfactions surveys are carried however do not cover all areas.	Customer feedback is gathered through various sources, this is reviewed and shared with staff and customers.  Satisfaction surveys are carried out and cover all areas. Generally, findings are shared with customers and staff.	Excellent customer service is a high priority with feedback proactively gathered, reviewed, and acted on. The commitment to excellent customer service is heavily promoted to all.  A variety of ways to feedback are available and promoted. Staff are involved in reviewing feedback and understand how they contribute to excellent customer service.

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Do					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
		The team have some awareness of feedback and the actions that are planned to drive improvement.	<p>Sharing the findings with staff and customers is done but not on a regular basis.</p> <p>There are still a few areas to be addressed.</p>	<p>Commitment to excellent customer service is known by staff and they are aware of how they contribute to this.</p> <p>There was some evidence of the findings informing plans and actions completed.</p> <p>There are limited opportunities for improvement.</p>	<p>Satisfaction surveys covering all areas are in place.</p> <p>Findings from feedback and surveys are shared with staff, customers, and stakeholders, including actions taken.</p> <p>Other methods such as social media, mori polls or similar and external surveys are used.</p> <p>Findings from feedback and surveys inform future plans for customer service.</p>
Measurement, Monitoring and Review					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
<b>How does the organisation measure, monitor and review the effectiveness of your customer journey?</b>	The facility provides limited evidence as to how customer experience is monitored or measured.	There is some evidence of how customer experience levels are monitored.	Proactive and reactive customer experience monitoring systems are in place.	The facility has developed good practice SMART methods to measure and review customer care standards.	A comprehensive monitor, measure and review process is in place and relevant milestones/ KPIs are being used.

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Measurement, Monitoring and Review					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
		<p>Limited sources of information are used to gain customer feedback.</p> <p>The facility measures key KPI's including retention, attrition and yield per member/customer.</p>	<p>There is regular monitoring and review of customer feedback using different sources such as post use questionnaires and online feedback.</p> <p>There are proactive measures in place to ascertain customer satisfaction levels.</p> <p>The facility has evidence of action based on the National Leisure Recovery Fund (NLRF) customer experience survey results, confidence indicators.</p>	<p>The facility is using an effective blend of qualitative and quantitative information to measure and review performance.</p> <p>Measurement includes key areas including those on delivery, timeliness, information, access, and the quality of customer service.</p> <p>Benchmarking takes place to ensure good practice is used to improve customer experience.</p>	<p>Best practice is used to measure and review customer experience.</p> <p>Milestones/ KPIs are used to track progress towards a longer-term outcome.</p> <p>There is evidence that customer comments are followed up to check the issues have been addressed.</p>

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Impact and Outcomes					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
<b>Can the facility demonstrate that their approach to the customer journey has had a positive impact on business?</b>	The facility provides limited evidence as to how customer experience is improving or the positive impact the customer care is having on the business.	<p>The facility is able to provide ad hoc evidence that retention levels have increased.</p> <p>The facility is able to provide ad hoc evidence of positive impact on financial performance</p>	<p>The facility is able to evidence some improvements to the business linked to improvements in customer service.</p> <p>The site can articulate the origins of the improvements.</p>	<p>Improvements made to the customer experience can be linked to the analysis of customer experience and a wide range of stakeholder feedback.</p> <p>The site can articulate how standards have improved overtime using reliable and accurate methods.</p> <p>The presence of under promise over deliver is evident.</p> <p>The facility use google analytics or another tool to monitor engagement on their website or social media.</p>	<p>NPS and customer feedback levels have increased causing a reduction in expenditure on marketing.</p> <p>Membership attrition levels have reduced, increasing the average length of time a person is a customer of the facility.</p> <p>Improved levels of both staff and customer satisfaction have improved retention scores.</p> <p>The facility is able to evidence an increase in the number of "referrals" as the source of new customers.</p>

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Impact and Outcomes					
Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
				The facility measure what percentage of their planned program was delivered and can evidence an annual percentage reduction in failure to deliver.	Financial targets are being exceeded in multiple areas of the business linked to improved customer satisfaction scores.