

Quest 2 – Customer Journey

Self-Assessment Preparation Form



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	Yes, No or NA
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?	



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Challenge:	Example of Best Practice:	What do we currently do?	What action can we take:
Mystery Visit			
Was the interaction with the team positive and enthusiastic?	<p>Team members have an efficient, positive, proactive approach to customer care with a friendly atmosphere throughout.</p> <p>There is a consistently high level of customer care throughout the visit.</p> <p>There is a positive atmosphere in the facility, making it a friendly place to visit.</p> <p>It is highly likely that customers will recommend others to visit the facility.</p>		
Were the team knowledgeable and informative?	<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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<p>Are enquiries and feedback made via the website or social media positively dealt with?</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>		
<p>Are enquiries made by telephone positively dealt with?</p>	<p>All calls were answered within a reasonable timeframe.</p> <p>Any automatic response system works to meet the customer's needs.</p> <p>The team provides proactive relevant information without hesitation. A comprehensive response was provided to all enquiries.</p> <p>Follow up contact made if required.</p>		





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<p>Are the facility social media sites up to date with relevant and engaging information?</p>	<p>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.</p> <p>Detailed product, pricing and timetable information was provided in recent posts.</p> <p>The images used on the site are reflective of the community. Recent testimonials or evidence of users attending events at the site.</p> <p>Evidence of quality engagement through questionnaires and feedback.</p>		
<p>Customer information is easily available and well-presented inside, and where applicable outside the facility.</p>	<p>All information is professionally displayed and up to date.</p> <p>There is a strong corporate brand imagine throughout the facility. Multi-media is effectively used.</p> <p>A 'less is more' approach has been taken, whilst ensuring information can be easily obtained.</p>		



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Mystery Visit			
<p>When you visit the facility for the first time, do they capture your personal information?</p>	<p>Comprehensive personal contact details are requested and recorded on the inhouse membership system (Age, address, postcode, email address, telephone number).</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>		
<p>Are team members well-presented and visible?</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>		





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Plan			
How do you plan to ensure that all customer expectations are met?	<p>Customer service plans are fully integrated into the values and ethos of the business.</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			
<p>How do you ensure that team members are trained to exceed customer expectations?</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>		
<p>Has the facility got suitable and sufficient staffing, equipment, and space to deliver excellent customer service?</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> <p>The facility has a detailed staffing level plan linked to programming, seasonal changes, and training needs.</p> <p>The facility has a comprehensive audit and feedback service linked to its customer service policy and procedures.</p>		



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Do			
<p>How do you use and communicate your findings in relation to improving the service for both customers and staff?</p>	<p>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.</p> <p>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. 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. 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>		





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Measurement, Monitoring and Review			
How does the organisation measure, monitor and review the effectiveness of your customer journey?	<p>A comprehensive monitor, measure and review process is in place and relevant milestones/ KPIs are being used.</p> <p>Best practice is used to measure and review customer experience. 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			
Can the facility demonstrate that their approach to the customer journey has had a positive impact on business?	<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> <p>Financial targets are being exceeded in multiple areas of the business linked to improved customer satisfaction scores.</p>		

