



Customer Service & Operations Development Worksheet

Use the instructions provided to lead you to creating a plan for developing the customer service and operations systems for your company.

The goal of the Customer Service and Operations system of a World-Changing business is to satisfy the unconscious and perceived needs of its customer in **remarkable** and **emotionally moving** ways.

When your service and operations are *remarkable*, your customers are inspired to literally “remark” on it to others.

When your service and operations are *emotionally moving*, you’ve actually connected with them in some way that makes them feel a particular way – excited, touched, inspired, hopeful, motivated, urgent, willing, happy, gleeful.

Each and every time you touch a customer is an opportunity to impact the way he or she feels – about herself, about the world, and about your business. If you are a consistent bright spot in a person’s day, imagine the subtle, yet powerful impact you have on his or her life. This kind of affect is at the heart of every World-Changing Business.

CREATE A VISION FOR YOUR CUSTOMER SERVICE & OPERATIONS

Creating a Vision for your products and services will enable you to think strategically about the services and products you bring to the world.

1. Bring to mind the company Core Values, Core Purpose, and Long-Term Inspired Goal:

<p>Company Core Values:</p> <ul style="list-style-type: none">• <i>[List them here]</i>
<p>Company Core Purpose:</p> <p><i>[List here]</i></p>

Company Long-Term Inspired Goal:

[List here]

2. Take a moment and consider how you would like your customer service and operations to contribute to your overall company vision by answering the following questions:

Imagine your business is fully operational and living out all the elements of your company vision. See your company delivering products and services to the public. Describe the kind of service you would like to deliver to your customers.

[Your answer]

How do you want your customers to feel when they interact with your business? Do you want them to feel inspired, motivated, hopeful, excited, peaceful, understood, calm, blissful, happy?

[Your answer]

Imagine that you are successful bringing into the world your products and services. What are people saying to others about you, your company, and your products? How would you want your customers to “remark” about your business to others?

[Your answer]

IDENTIFY THE CUSTOMER SERVICE AND OPERATIONAL NEEDS YOU WOULD LIKE YOUR BUSINESS TO FULFILL

Your customer service and operations system includes every interaction you have with a person from the moment they become a customer. If you are a service-based (versus product-based) business, then a huge piece of your business is dependent on your customer service and operations systems.

These fall under three main categories:

Production – Production is what it take to make your product or service a reality. It starts where your product design leaves off. Production is how you actually create, make, or acquire that product or service so you can sell it. The way you produce the materials that are shipped, emailed, or delivered in some way to your customers

- Manufacturing process
- Raw materials and supplies
- Writing a workshop, eBook, teleclass, or presentation
- Recording and duplicating CDs
- Producing multiple copies of a workbook, manual, information document, or program
- Acquiring expertise from another in the creation of materials
- Partnering with vendors
- Testing
- Purchasing
- Assembly
- Quality Control
- Packaging

Delivery – This is getting your product or service from your business to your customers. It begins where your production leaves off. There is some element of “transportation.” Delivery transfers the value of a product or service to your customer.

- How customers place orders
- Receiving the customers order
- Scheduling your customers
- Communicating status of delivery to customer
- Billing people for their product
- Shipping, packaging, and logistics
- Giving a workshop, teleclass, consulting session, meeting, coaching session, etc.
- Providing a final written document

Customer Service – Whatever you can do to provide over and above the minimum requirements the customer expects as honest value for his money.

- The way you respond to phone calls and emails
- The way you answer questions
- Attitude
- Assistance
- Information and advice
- Training,
- Maintenance
- Credit/financial arrangements
- Added value

- 3. In the following table create a list of all the customer service and operational needs you want your business to fulfill.**
- **Include Production needs, Delivery needs, and Customer Service needs**
 - **After you create the long list, in column C, go through and prioritize each item on the list as either “Must Have,” “Nice to Have,” “Want to Have Some Day,” and “Not That Important”**
 - **In column D, identify which items on the list are already being handled in some way**
 - **In Column E, for the items that are being handled, identify *how* it’s currently being handled.**
 - **In Column F, put an “X” for the items you intend to focus on improving or developing in the next 3 months**
 - **For the items you “X’ed” in Column F, answer in Column G how you could fulfill the specified need in the simplest possible way (possibly using technology, templates, partnerships, by hiring someone, or some other creative way).**
 - **For the items you “X’ed” in Column F, answer in Column H, how you could fulfill the specified need in a way that is both remarkable and emotionally-moving.**

A	B	C	D	E	F	G	H
Item #	Customer Service or Operations Need	Priority	Is it currently handled?	How it’s currently handled	“X” the items you intend to focus on in the next 3 months	How you fulfill the need in a way that would make it easy long-term?	How you’d like to handle it – make it remarkable and emotionally-moving
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NOTE: Frequently update this table and keep a current copy in your World-Changing Business Binder.

ENSURE THAT YOUR PROCESS IS CONSISTENT

Consistency comes down to two simple things –

- **Documenting the ideal process (*Standard Operating Procedure Worksheet*)**
- **Following the process you documented**

Document The Ideal Process

- 4. Using the list from #3 above, document each process you put into place. For each process, complete the *Standard Operating Procedure Worksheet*, and put it into your *World-Changing Business binder*.**

The point of documenting the process will enable you to get clear and specific about how you intend to handle each customer need. It will also enable you to identify the costs of the process along with identify opportunities for improvement.

An *improvement* is one of the following:

- Making the process easier and less time-intensive by using technology, tools, templates, partners/outsourcing, or hiring someone to do it.
- Making the process somehow better for your customer.

As you make improvements, update the Standard Operating Procedure and post it in your World-Changing Business binder.

So often small business owners “shoot from the hip” when handling customer needs. The drawback is that the entrepreneur never gets the opportunity to optimize or improve the way she or he does business. Thus, the process is probably taking the entrepreneur more of his time and energy than is necessary. Hence, documenting the process ultimately allows the entrepreneur to have more time.

Another advantage to the entrepreneur is that it makes it simple and easy to hand off a documented procedure to someone else. Small business owners constantly complain that it would take them longer to explain to someone else how to complete a task than it would to do it themselves. This is a dangerous pattern of self-sabotage that will ultimately impede your growth. However, by taking a few minutes to document your procedures, you make it simple and easy to let others help you.

Having a clearly defined process will also help you get real about the energy, effort, and cost of delivering each and every need to your customer. This is important for several reasons. It can help you truly understand the level of commitment and value you bring to your clients – and hopefully this will enable you to feel confident to charge accordingly. It will also help you better manage your time, by helping you see what it really will take



to fulfill on all the promises your making. Hopefully that will support you in not over-committing and sabotaging your joy, freedom and success. Finally, once a process is clear and specific, it becomes possible to track your success and see what's actually working. This will allow you to fulfill your customers needs to an even higher degree.

Follow the Ideal Process

Once it's documented, commit to following through with the documented ideal process each and every time. No exceptions.

When you follow your own ideal process, you raise the level of integrity in your organization. It is by these little daily steps that a World-Changing Business is truly born.

It's the difference between having a hobby and a true business.

When you follow your own instructions, you set the tone for every person who ever becomes a part of your business to do the same.

To become the business you want to be, you have to be willing to dress and act the part starting today.

TRACK YOUR SUCCESS

One of the primary functions (if not the primary function) of your Customer Service and Operations system is to convert one-time customers into long-time clients.

Tracking your success will help you improve your overall ability to convert one-time customers to clients, as well as provide even greater impact to them personally.

Three key measurements of success:

- How many of your one-time customers are converted to long-term clients
- How long your long-term clients stay with you and how much they buy
- How many referrals your clients make

Together these three measures tell you how meaningful a relationship your client has with you.

5. Track your success so far.

Using whatever customer data you have, answer the following:

<p>A - The total number of customers you have served (or that you have data for):</p> <p style="text-align: center;">[The number]</p>
<p>B - What was the total amount of money they spent on your services or products:</p> <p style="text-align: center;">[The number]</p>
<p>C – The average dollar amount each customer has spent on your products and services to date:</p> <p style="text-align: center;">[B/A]</p>
<p>D – The number of “Long-Term Clients” – those customers that purchased more than one product or service from you (or committed to >1 month of services from you):</p> <p style="text-align: center;">[The number]</p>
<p>E – Your Long-Term Client Conversion Quotient:</p> <p style="text-align: center;">[D/A]</p>
<p>F – On average, the length of time your Long-Term Clients stay with you. (Add up the total time each of your Long-Term Customer have been with you and divide by the total number of Long-Term Clients, or “D”)</p> <p style="text-align: center;">[Total amount of Time All your Long-Term Clients Have Stayed with You / D]</p>
<p>G – The total number of referrals your customers have given you:</p> <p style="text-align: center;">[The number]</p>
<p>H – Your referral quotient</p> <p style="text-align: center;">[G/A]</p>

6. Set goals to improve.

Now that you have a picture of where you are, set some goals to improve these numbers. If you were to improve your process and shift your consciousness in this direction, what could you expect to see?

Your new monthly goals:

<p>Your Long-Term Client Conversion Quotient:</p> <p>6-Month GOAL: [Your number]</p>
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<p>12-Month GOAL: [Your number] 24-Month GOAL: [Your number]</p>
<p>The total average length of time your Long-Term Customers will stay with you:</p> <p>6-Month GOAL: [Your number] 12-Month GOAL: [Your number] 24-Month GOAL: [Your number]</p>
<p>Your referral quotient:</p> <p>6-Month GOAL: [Your number] 12-Month GOAL: [Your number] 24-Month GOAL: [Your number]</p>

7. Make process improvements.

Review your Standard Operating Procedures to see how you can tweak them to bring you the results you stated in #6.

8. Start a monthly process of collecting data.

Agree on a specific day each month when you will collect, track, and record your data. For example, you might decide to do it on the first Thursday of each month, or maybe on the 1st working day of each month.

Put this commitment on your calendar for the next 12 months. Block 2 hours each month for this exercise. (It probably won't take you that long, but give yourself enough time to start, so that you don't underestimate the effort.)

Use the time to review your list of customer needs (#3), your Standard Operating Procedures, and your customer relationship metrics (by following instructions from #5).

Put the monthly updates and results into your World-Changing Business Binder.

Use the data to help you guide your business.