

## Customer Service Action Form Instructions

Use the following form to help create your own internal company customer satisfaction information and action sheet. Customize it to reflect the types of products and/or services that you offer. Consider carefully both the routing of the form through the company and when you should personally get involved. Hopefully, your employees should be able to handle many situations without involving you directly. For example, if you deal in merchandise and the wrong items are shipped, your employees can quickly ship the right goods and arrange for a pick-up of the erroneous order. But if the goods are custom made, or if it's your biggest customer, you might want to be part of the problem resolution process from the outset. And you'll want to have the form routed to you last. That way, you can review the types of issues being raised and see how your employees have resolved them.

Make it clear to your employees that this form isn't just window dressing: it is an important part of your business' efforts to satisfy your customers. Every employee should have a supply of these to get the ball rolling when faced with a situation that he or she cannot resolve. And everyone should be aware of the priority that these reports should be afforded and the turn-around time expected for resolution. Consider printing them on a distinctively colored paper so that they don't get lost on a desk or in an in-basket.

This type of form helps prevent customer problems from falling through the cracks, while at the same time providing for an orderly hand off to someone who can address the matter. It also sends a couple of messages to your employees. First, there is a clear procedure to follow when a customer is unhappy. Second, you are looking to their good judgment to recognize problems and promptly suggest (and, frequently, implement) solutions. Third, it reinforces the message that your employees are a team, working to achieve common goals. In a well-run business, employees who are the primary customer contacts will originate many of these forms, not management.

**CUSTOMER SERVICE ACTION FORM**

Customer	Time & Date
	Originator
Telephone	Department
	Telephone
Situation requiring action	
<b>ROUTING</b>	
To	Department
Time received	
Action taken	
Recommended next steps	
To	Department
Time received	
Action taken	
Recommended next steps	
To	(last)