

# THE HONESTY AUDIT

Keep Your Customers Guide to Identify Exactly What  
Your Customer Relations is Missing

# BE HONEST ABOUT YOUR GOALS

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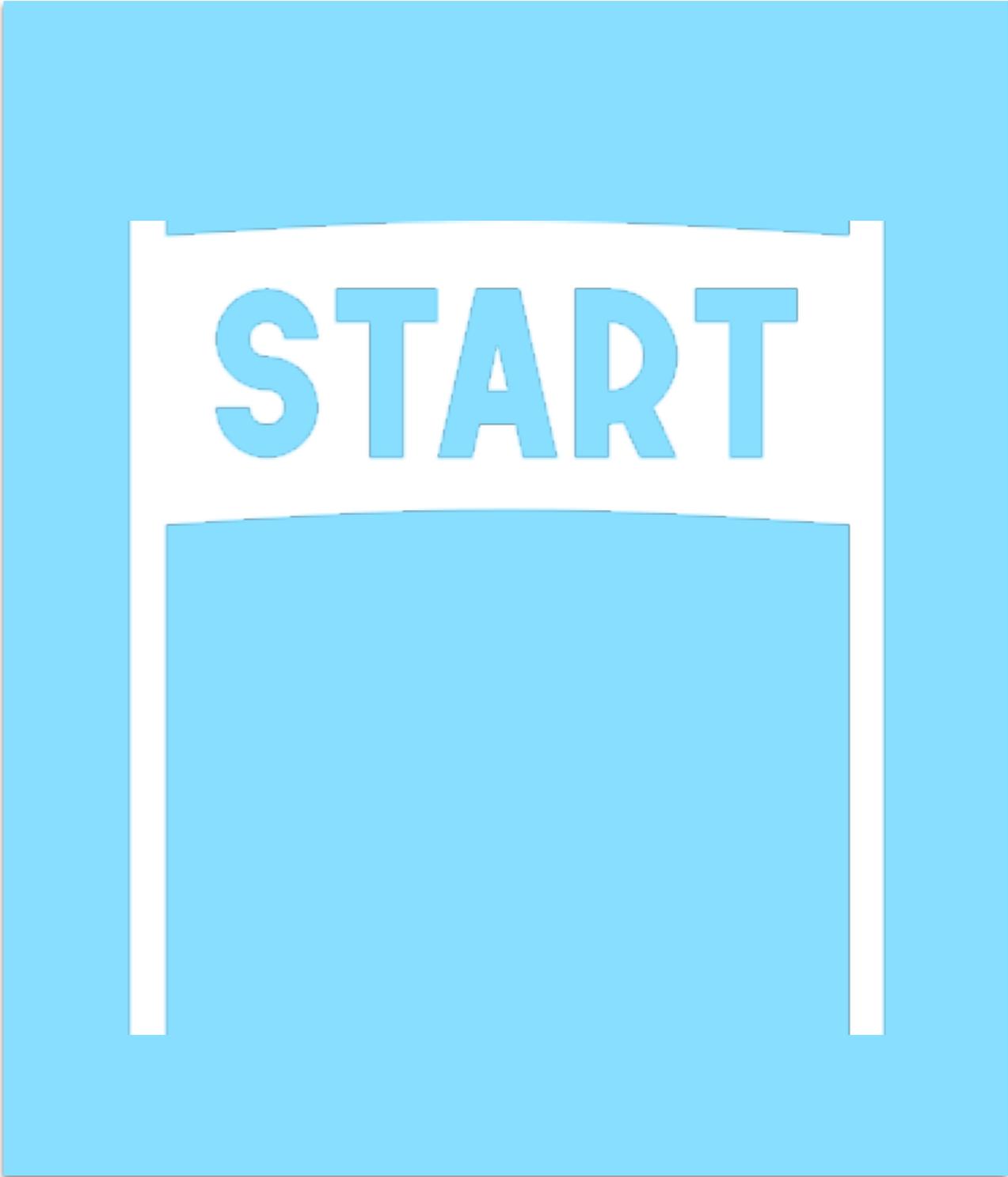
## COMPLETING THE HONESTY AUDIT WILL...

- Provide an understanding of how your company interacts with its customers
- Identify service gaps, which can crush customer enthusiasm if not addressed
- Outline a structure for a roadmap to better customer service

# AUDIT KEYS

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- Conduct over a 30-day period, outside of peak season
- Choose a time that will evaluate typical day-to-day interactions between service and customers
- Repeat annually to track progress



START

# WHAT YOU NEED FOR AN HONESTY AUDIT

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1. Access to customer interactions over the past 30-days in every channel your company uses to communication with customers
2. Understanding of company's customer service procedures and process for resolution
3. Workbook to chart each interaction measured

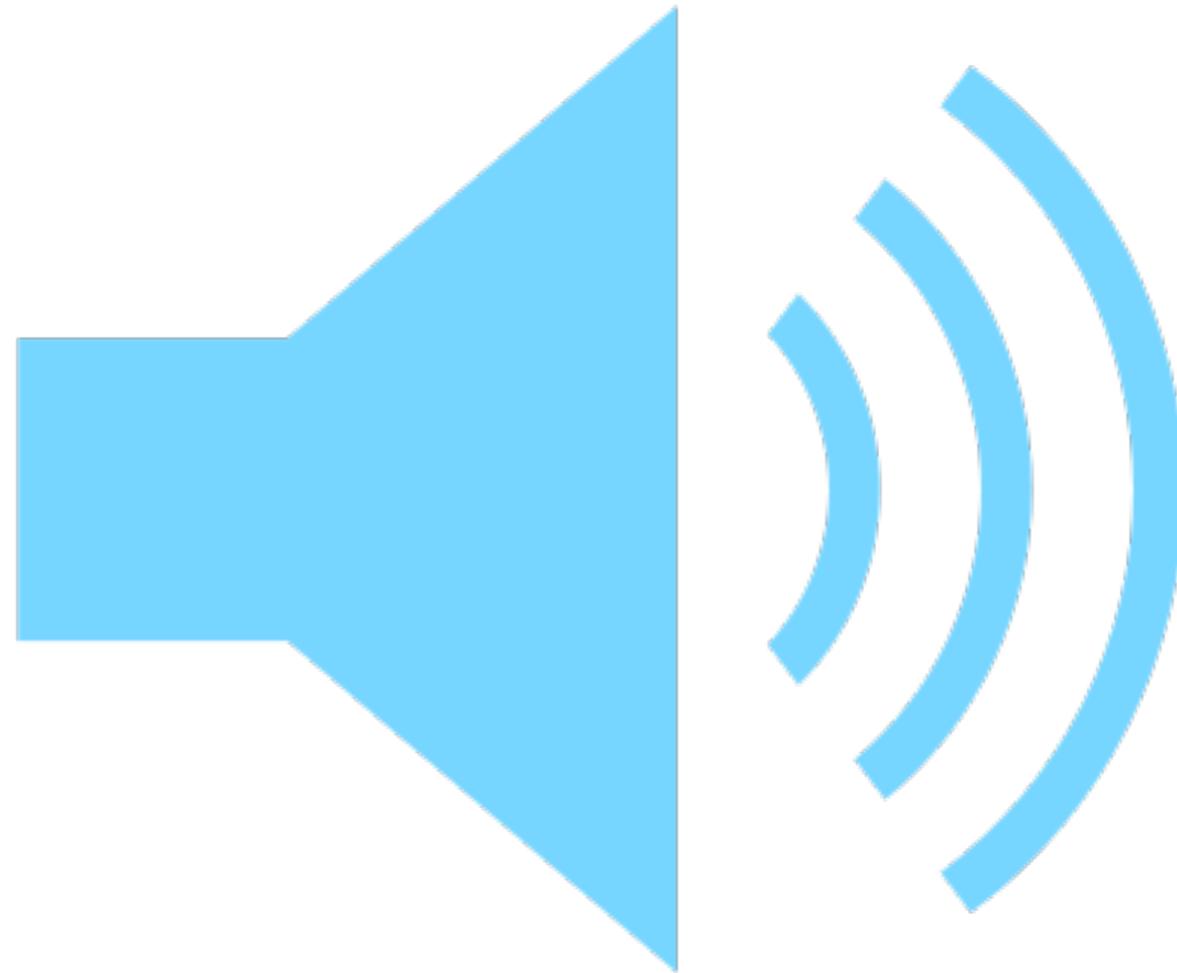
We made you one to get started. [Click here to get the Google Sheets version.](#)

# HONESTY AUDIT INGREDIENTS

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1. Interaction Volume
2. Tenor
3. Speed
4. Results
5. Helpfulness
6. Transparency





# INTERACTION VOLUME

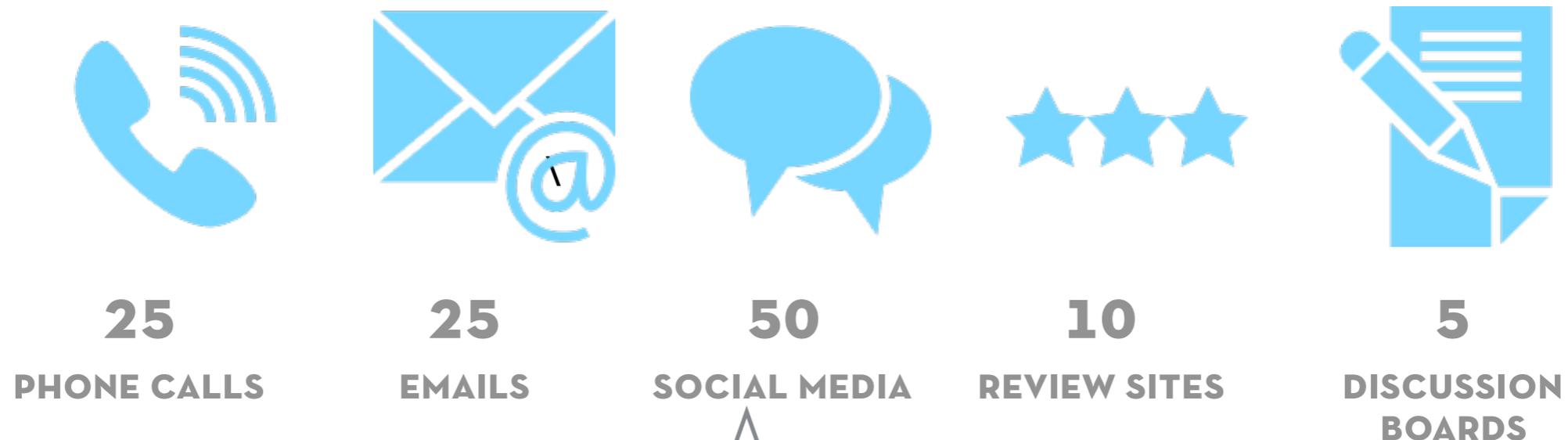
Purpose: Identify the loudest channels where your company interacts with customers

# START WITH INTERACTION POINTS

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1. Identify all the ways a customer can get in touch with your company.
2. Divide the audit across all channels by how “loud” that channel becomes with customer feedback and complaints.

Note: Tweak the interactions ratio as needed to get an accurate sample of your company’s customer interactions.



social media gets more attention because customer service is now a spectator sport.



# TENOR

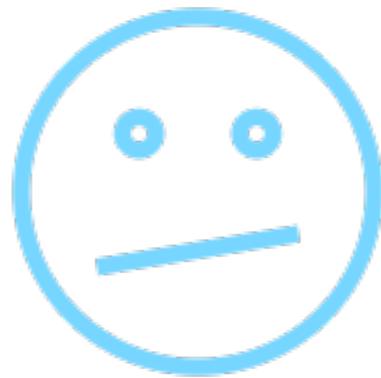
Use a scale to gauge customer sentiment

# RANKING CUSTOMER TONE

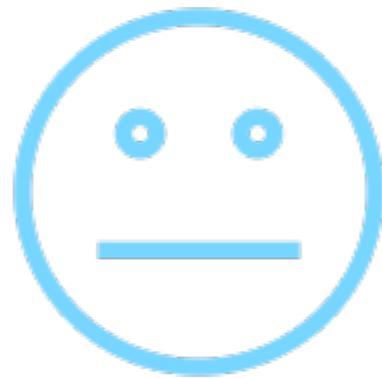
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1



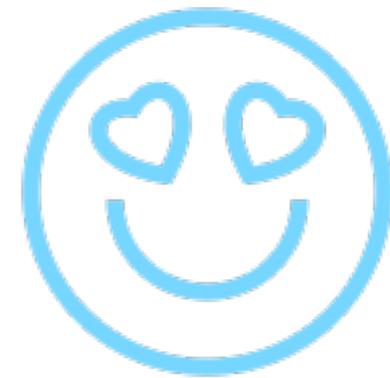
2



3



4



5

- Was the intent of the interaction initially positive (praise or feedback) or negative (complaint or problem)?
- Did the company's response affect the customer's tone or mood during the interaction?

# TENOR TAKEAWAYS

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**FOLLOWING THIS EXERCISE, YOU SHOULD BE ABLE TO GLEAN THE FOLLOWING INSIGHTS...**

- Where are my customers happiest?
- Where do they seem to be most negative?
- Is there opportunity to move customers from neutral interactions to positive with some effort?



# **SPEED**

Time your company's responses to a complaint

# CHARTING SPEED

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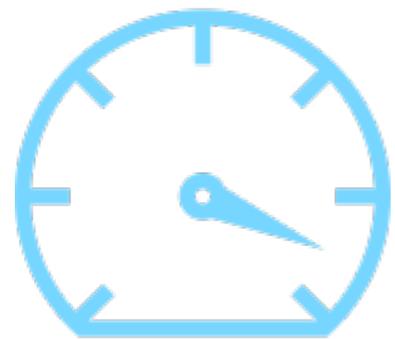
**FOR EACH INTERACTION, DOCUMENT THE LENGTH OF TIME BETWEEN THE ORIGINAL POST AND THE COMPANY'S RESPONSE.**

- Was there a company response? If no, indicate that on the chart. (Happens often on third-party discussion boards, forums or unmonitored review sites)
- How long, in minutes and hours, did it take your company to respond to a customer post?
- If there was additional replies or follow up needed, be sure to document the length between each step, and the total duration of the interaction through resolution.

# RANK SPEED IN REPLYING

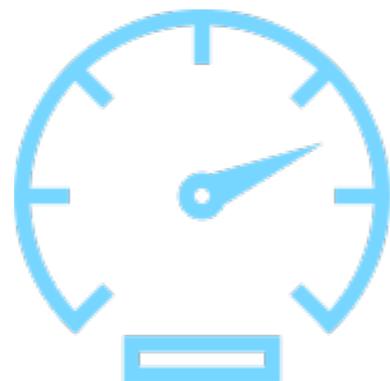
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- Use (zero) if there is no response from the company to the customer's post
- Create a scale that fits to your company's expectations and reality for replying to customers in different channels.
  - If response time is \_\_\_, than score it \_\_\_
- Note: Use the suggested speed scale below as a place to start scoring your company's replies. As the company gets quicker, the scale will need to change to account for minutes and hours, not days and weeks.



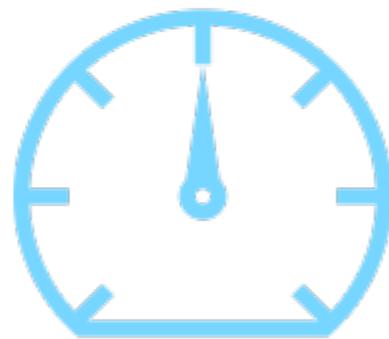
OVER 1 WEEK

1



2-7 DAYS

2



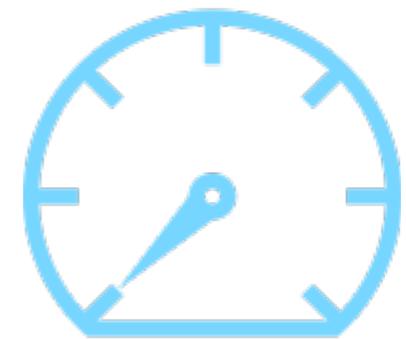
24-48 HOURS

3



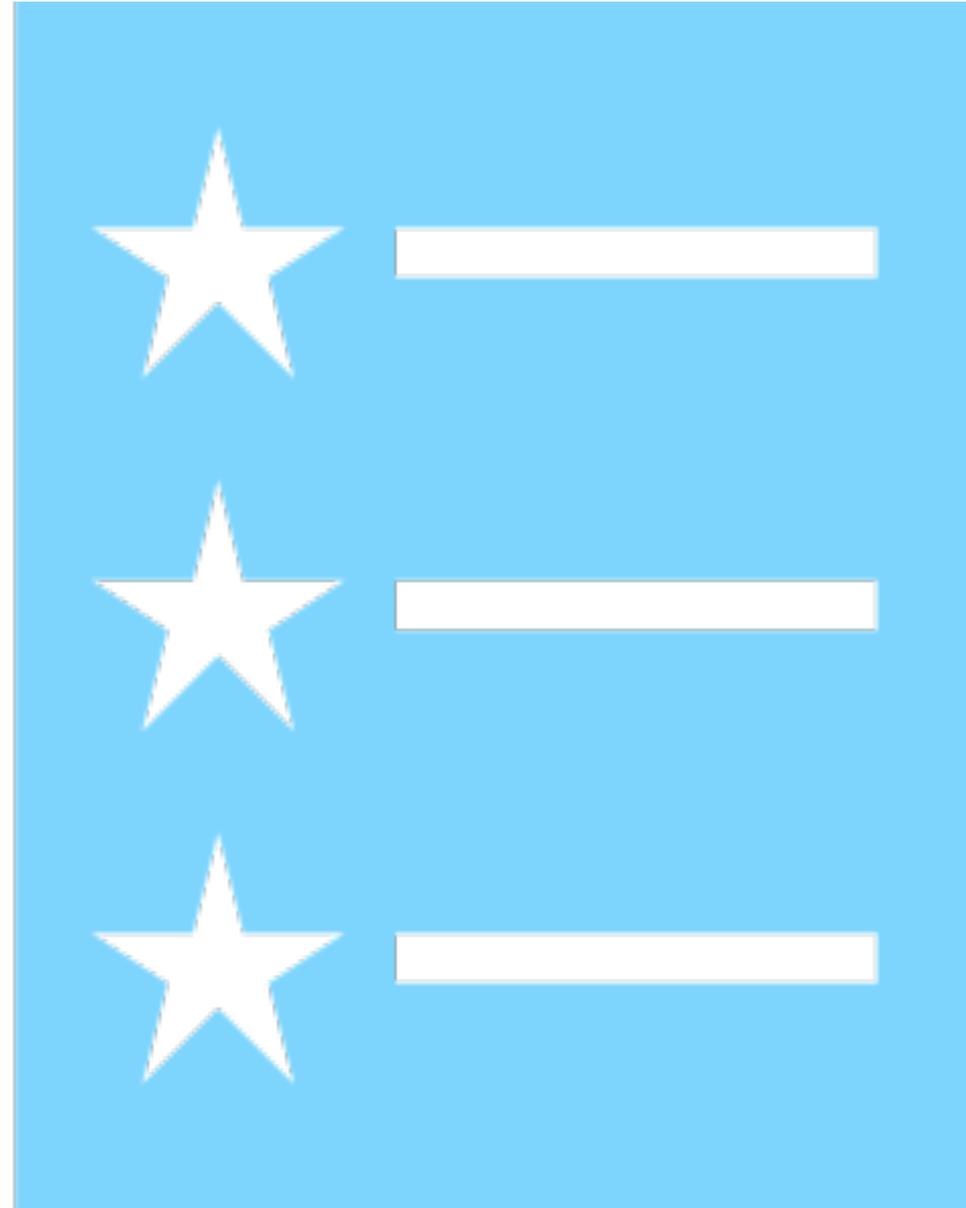
1-24 HOURS

4



> ONE HOUR

5

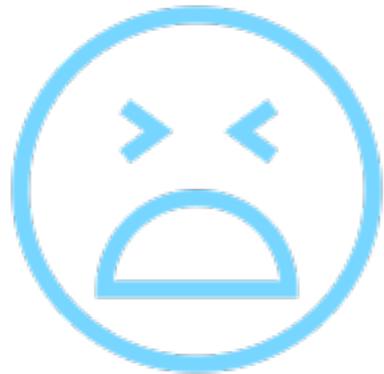


# RESULTS

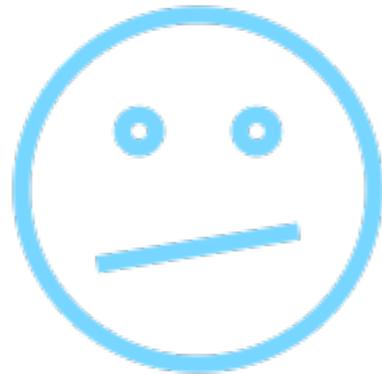
Pay attention to your customers' replies

# RATE REPLIES ON TENOR SCALE

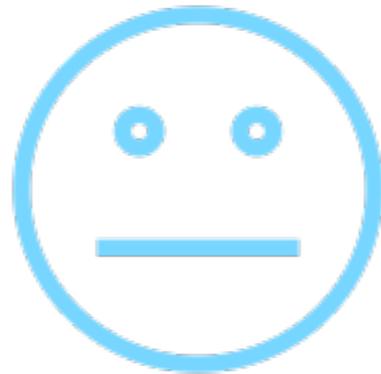
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1



2



3

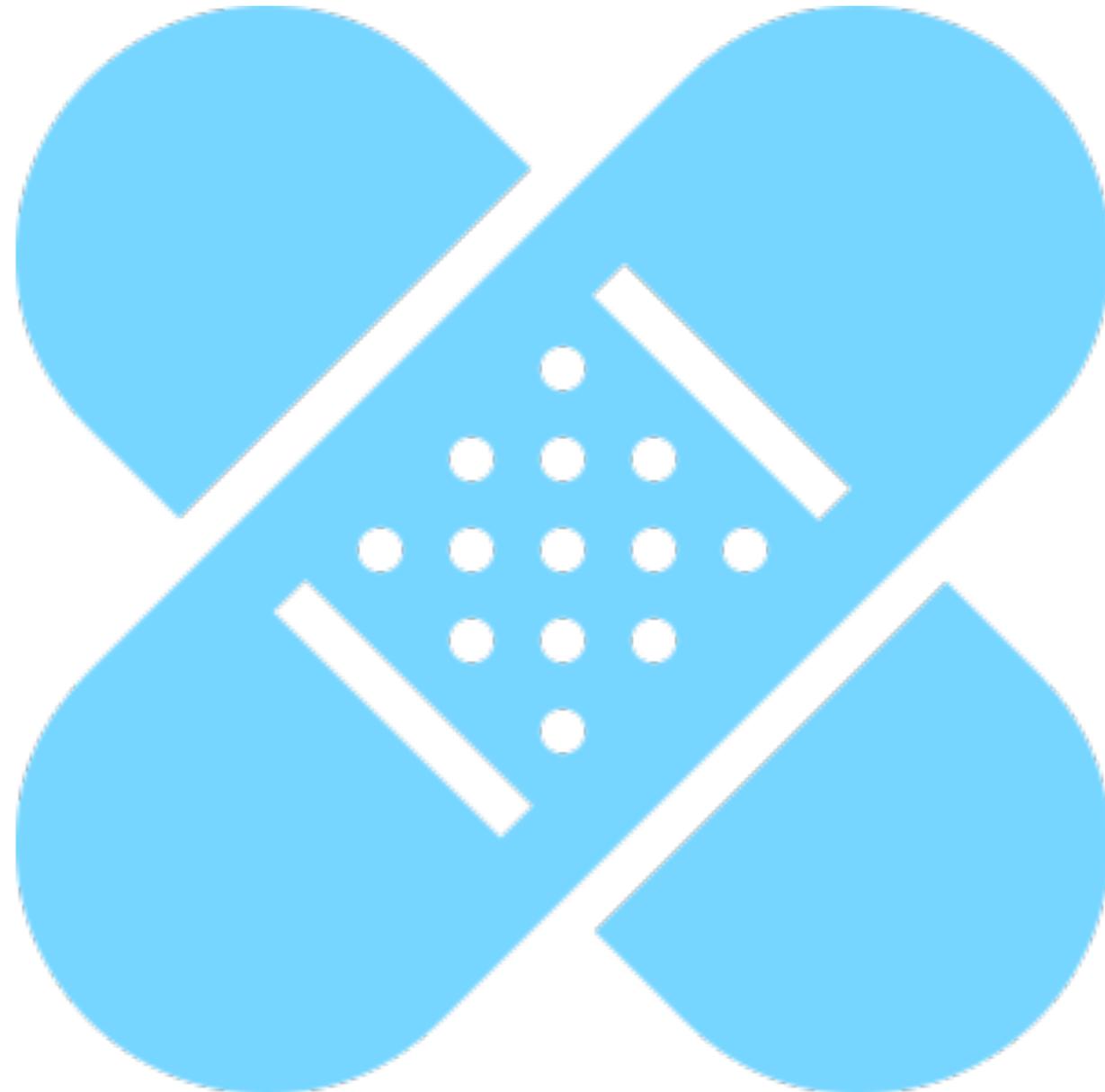


4



5

- In this step, look at the customer's replies following the company's response to their initial complaint or issue.
- Did the company's response affect the customer's tone or mood during the interaction?
- How did the customer walk away from the interaction feeling?



# HELPFULNESS

Critical thinking will determine if the company response was actually the ideal interaction

# WAS YOUR COMPANY HELPFUL?

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**SPEND TIME WITH EACH INTERACTION TO DETERMINE WHETHER YOUR COMPANY TRULY ASSISTED AND PROVIDED VALUE TO THE CUSTOMER**

- Did the company respond? If no, then determine what simple responses can acknowledge or thank the customer for their efforts to interact with the company.
- What is the most helpful response to each particular comment or inquiry from a customer?
- What is the ideal interaction in each scenario, from both the customer and company's point of view.

# THE HELPFULNESS SCALE

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- If there is no response from the company, score this interaction a (zero).
- Rank the helpfulness of the company in each interaction on a scale from one (lowest) to five (highest) based on the ideal interaction from the point of view of both parties.



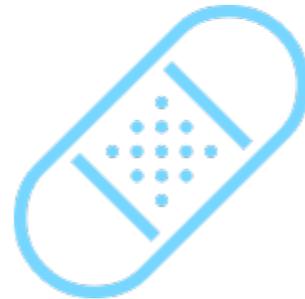
**DIDN'T  
ACKNOWLEDGE  
ISSUE**

**1**



**GENERIC  
REPLY**

**2**



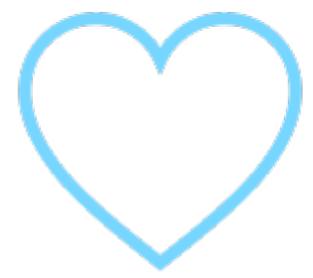
**MEETS  
COMPANY  
STANDARD**

**3**



**GOOD  
CUSTOMER  
INTERACTION**

**4**



**ABOVE AND  
BEYOND**

**5**



# TRANSPARENCY

Turning complainers into advocates is much easier  
when being open and honest

# TRANSPARENCY IS EQUAL TO TRUST

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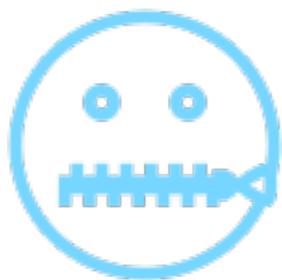
**REFLECT ON EACH INTERACTION AND HOW YOUR COMPANY APPROACHES EACH CHANNEL TO GAUGE IF TRANSPARENCY WITH CUSTOMERS IS A CURRENT BRAND CHARACTERISTIC**

- Was the company open and honest in each customer interaction?
- Is it easier for my company to be more transparent in one channel compared to others?
- What hurdles may be keeping my company from being transparent with all customers?

# TRANSPARENCY SCALE

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- If there is no response from the company, score this interaction a (zero).
- Score based on a strict scale according to criteria:
  - 5 = Open and honest company response, as much as responsibly possible
  - 3 = Approved company response, without additional details or specifics
  - 1 = Response had little to no information specific to this issue or complaint



NO INFORMATION

1



STANDARD RESPONSE

3



OPEN AND HONEST

5

# Now WHAT?

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- Use the Honesty Audit worksheet to score each interaction measured on the five scales explained.
- Calculate average ratings by interaction channel
- Calculate average ratings by Audit Ingredient
  - Higher ratings indicate the company is performing better in these channels,
  - Lower ratings indicate areas for improvement
- Raise findings to management to architect a roadmap to keeping your customers



FINISH