Reliasourcing
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CUSTOMER SERVICE IMPROVEMENT CHECKLIST

Use this checklist to evaluate your current customer service operations and uncover quick wins. If you manage an in-house team or outsource with a partner, these steps will help you build a high-performing CX function today.

☐ Training & Empowerment

- All agents receive role-specific onboarding (product, tools, policies)
- Ongoing coaching sessions are scheduled weekly or bi-weekly
- Soft skills like empathy, active listening, and problem-solving are part of training
- Agents have authority to resolve common issues without escalation

☐ Customer Feedback

- Post-interaction CSAT or CES surveys are active across all channels
- Reviews (e.g., Trustpilot, G2) are monitored and responded to regularly
- Feedback loops are built into team meetings and performance reviews
- Customer complaints are tracked and categorized for trend analysis

☐ Technology Stack

- CRM (e.g., Salesforce, HubSpot) is fully integrated with your support channels
- Chatbots or automation tools are used for basic inquiries or after-hours support
- Agents have access to knowledge bases or internal wikis for quick resolution
- Omnichannel support is consistent across email, phone, chat, and social

☐ Personalization

- Agent responses are tailored using past interaction history or behavior data
- Follow-ups are specific to the issue, not templated
- Upsell or retention conversations are contextual—not scripted
- Feedback from support is shared with product/marketing teams for alignment

☐ KPI Monitoring

- Core metrics tracked: FCR, CSAT, AHT, CES, Call Abandon Rate
- Daily or weekly reports are reviewed with operations and team leads
- Underperforming metrics trigger process reviews or coaching plans
- Data-driven improvements are documented and implemented regularly

Pro Tip: Consider working with a specialized outsourcing partner like Reliasourcing to implement this checklist faster, without compromising quality.