

Customer service audit checklist

Review a real customer journey and the operating records. Score 0 = broken, 1 = partially works, 2 = works. Leave unreviewed items blank.

Accessibility

- 01. ☐ Are all advertised channels staffed?
- 02. ☐ Can customers find a live support route?
- 03. ☐ Are outside-hours instructions accurate?
- 04. ☐ Can customers choose a suitable channel?
- 05. ☐ Does language coverage match customer needs?
- 06. ☐ Are accessibility requests routed appropriately?
- 07. ☐ Do actual channel tests match the published promise?

Speed

- 08. ☐ Is first response measured consistently by channel?
- 09. ☐ Are wait-time definitions and exclusions documented?
- 10. ☐ Are long waits visible beside the average?
- 11. ☐ Are promised callbacks completed on time?
- 12. ☐ Is unresolved ticket age reviewed?
- 13. ☐ Are abandonment peaks investigated by interval?
- 14. ☐ Do queues retain an owner during peaks?

Resolution

- 15. ☐ Is resolution defined from the customer's task?
- 16. ☐ Are repeat contacts linked to the original issue?
- 17. ☐ Are unnecessary transfers identified?
- 18. ☐ Does context follow channel changes?
- 19. ☐ Are agent decision limits clear?
- 20. ☐ Are resolved tasks verified in reviewed samples?

Resolution

- 21. ☐ Do downstream tasks have an owner and due point?

Quality

- 22. ☐ Does QA use observable criteria?
- 23. ☐ Does sampling cover agents and channels fairly?
- 24. ☐ Do reviewers calibrate disputed scores?
- 25. ☐ Are product and policy answers consistent?
- 26. ☐ Are poor experiences reviewed for recurring causes?
- 27. ☐ Are required programme disclosures reviewed?
- 28. ☐ Are corrections tracked through completion?

Agent experience

- 29. ☐ Can agents find the required tools and records?
- 30. ☐ Is the knowledge base current and searchable?
- 31. ☐ Does onboarding test real task decisions?
- 32. ☐ Are tool and access gaps logged?
- 33. ☐ Does coaching use reviewed interactions?
- 34. ☐ Can agents raise improvement requests to an owner?

Measurement

- 35. ☐ Do reports state populations and periods?
- 36. ☐ Do rates retain their original denominators?
- 37. ☐ Are surveys and complaints assigned to owners?
- 38. ☐ Are leading contact causes reviewed?
- 39. ☐ Can the team identify a decision changed by evidence?
- 40. ☐ Are corrective actions and re-audit dates recorded?

Evidence / owner / next action: _____

Review date: _____ Re-audit date: _____