

## Customer Service Assessment

Innovative interventions don't trump the value of a simple collaborative effort that makes stakeholders feel integral and involved in the treatment process. This evaluation is a self-assessment tool designed to help identify three organizational areas in which you can improve referent relations.

1. Strategic: Needs external to the organization (communities, referents, families, clients, etc.)
2. Tactical: Organizational systems congruent with your institutional objectives
3. Operational: Alignment of services with performance objectives

Using the scale below, please circle the number that best corresponds to your answer. When finished, email to [david@treatmentsystemsdevelopment.com](mailto:david@treatmentsystemsdevelopment.com) for a complimentary analysis of your company needs.

	Not At All		Somewhat		Yes, Definitely
Is stakeholder and referent involvement a first priority or an afterthought?	1	2	3	4	5
Have you established your company's unique selling point to appeal to your stakeholders and referents expectations?	1	2	3	4	5
Every incoming call is a potential admission. Is every call tracked from incoming through follow-up?	1	2	3	4	5
Are your Information Management Systems organized to facilitate marketing, intake, and clinical staff tracking your primary stakeholders and referents needs?	1	2	3	4	5
Has your organization developed a plan of communication with referents?	1	2	3	4	5
Is your staff's hierarchy of responsibilities organized to ensure referent relations are job one?	1	2	3	4	5
You cultivate your industry reputation one engagement at a time. Employees who interface with decision makers and referents set the tone for future referrals. Are they credible brand ambassadors for your organization?	1	2	3	4	5
Have you ever solicited feedback from stakeholders and referents about the services your organization provides?	1	2	3	4	5
Have you ever conducted a formal needs assessment?	1	2	3	4	5
Do you know how to collect and use data to help you in the planning process?	1	2	3	4	5
Does your organization track performance measures for evaluation purposes?	1	2	3	4	5

If business development has been deferred due to pressures from the daily delivery of services, you can benefit from an objective assessment to identify opportunities and improve your position in the industry. With 25 years' experience in the direct delivery of care, we can help you organize executable operational systems that make your institution a top tier referral for stakeholders. Contact us to put your business development plan in action today.

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