

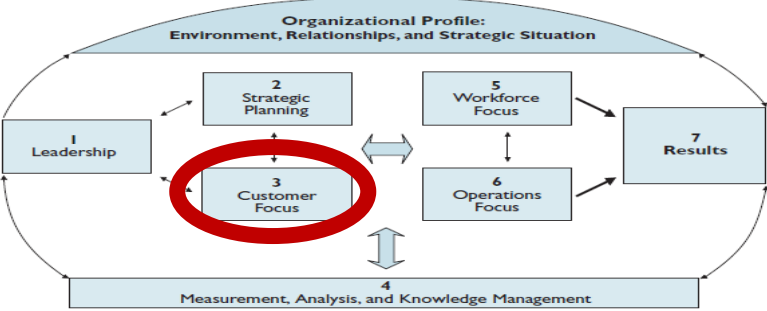
For a FREE Excel version, please contact info@master-key.ca.

Malcom Baldrige Assessment The Customer Focus assessment is one of 7 components for the complete MB Assessment. This category examines how your organization engages its customers for long-term marketplace success. This engagement strategy includes how your organization listens to the voice of its customers, builds customer relationships, and uses customer information to improve and identify opportunities for innovation. This is a simple assessment - for the detailed and complete version please visit <http://www.nist.gov/baldrige> or contact info@master-key.ca



Scoring instructions at bottom of survey. Note - only insert 1's in yellow boxes - choose a score from 1-5 that represent the best answer - do not insert 1's in any other colored or plain boxes (as there are formulas).

**Baldrige Criteria for Performance Excellence Framework
A Systems Perspective**



Section 3 (Customer Focus) - SUMMARY

| | Score out of 5 | Level |
|---|----------------|-------------------|
| 3.0 Overall Score - Customer Focus | 2.3 | <u>Developing</u> |
| 3.1 Voice of the customer | 1.9 | |
| 3.1.a Customer Listening | 0.5 | |
| 3.1.a.1 Listening to Current customers | 1.0 | |
| 3.1.a.2 Listening to Potential customers | 0.0 | |
| 3.1.b Customer Satisfaction | 3.3 | |
| 3.1.b.1 Satisfaction and Engagement | 3.0 | |
| 3.1.b.2 Satisfaction and Engagement (relative to competitors) | 3.0 | |
| 3.1.b.3 Satisfaction and Engagement (relative to competitors) | 4.0 | |
| 3.2 Customer Engagement | 2.8 | |
| 3.2.a Product Offerings and customer support | 3.0 | |
| 3.2.a.1 Product Offerings | 4.0 | |
| 3.2.a.2 Customer Support | 5.0 | |
| 3.2.a.3 Customer Segmentation | 1.0 | |
| 3.2.a.4 Customer Data Use | 2.0 | |
| 3.2.b Building Customer Relationships | 2.5 | |
| 3.2.b.1 Relationship Management | 2.0 | |
| 3.2.b.1 Complaint Management | 3.0 | |

| Overall Score | Category |
|---------------|---------------|
| 1 | Beginning |
| 2 | Developing |
| 3 | Competitive |
| 4 | World Class |
| 5 | Best in Class |

Section 3 (Customer Focus) - SCORING

| OVERALL SCORING | | | | |
|-----------------|-----|---------|------|-----------|
| POOR | LOW | AVERAGE | GOOD | EXCELLENT |

YOUR SCORE (1-5)

| | |
|--|------------|
| 3.1 Voice of the Customer: How effectively do you obtain information from your | 1.9 |
| Describe how your organization listens to your customers and gains satisfaction and dissatisfaction information. | |

1 2 3 4 5

| | |
|------------------------------|------------|
| a. Customer Listening | 0.5 |
|------------------------------|------------|

Score 1-5

1 2 3 4 5

| | |
|--|------------|
| <u>1. Listening to Current customers</u> | <u>1.0</u> |
|--|------------|

| | | | | | | |
|--|-----|--|---|-------------------------------|--------------------------------|------------------------------------|
| How effectively do you listen to customers to obtain actionable information? | 1.0 | Not well | Sometimes Adequate | Adequate | effectively | very effectively |
| How effectively do your listening methods vary for different customers, customer groups, or market segments? | 1.0 | don't vary at all between segments, groups, or | vary a little bit between market segments | vary for market segments | vary for customer groups | vary drastically for each customer |
| How effectively do you use social media and Web-based technologies to listen to customers, as appropriate? | 1.0 | don't use web based tech | use web based tech a little bit | use web based tech adequately | use web based tech effectively | use web based tech very |
| How effectively do your listening methods vary across the customer life cycle? | 1.0 | don't vary at all | vary a little bit | vary | vary effectively | vary very |
| How effectively do you follow up with customers on the quality of products, customer support, and transactions to receive immediate and actionable feedback? | 1.0 | ineffectively | a little bit | try to follow up | follow up effectively | follow up very effectively |

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| <u>2. Listening to Potential customers</u> | <u>0.0</u> |
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|---|-----|-----------------|--------------|----------|-----------|----------------|
| How well do you listen to former customers, potential customers, and customers of competitors to obtain actionable information and to obtain feedback on your products, customer support, and transactions, as appropriate? | 2.0 | not well at all | a little bit | adequate | effective | very effective |
|---|-----|-----------------|--------------|----------|-----------|----------------|

Score 1-5

1 2 3 4 5

| | |
|---|------------|
| b. Determination of customer satisfaction and engagement | 3.3 |
|---|------------|

| | |
|---------------------------------------|------------|
| <u>1. Satisfaction and engagement</u> | <u>3.0</u> |
|---------------------------------------|------------|

| | | | | | | |
|--|-----|--|--|--|--|--|
| How effectively do you determine customer satisfaction and engagement? | 3.0 | | | | | |
| How effectively do these determination methods differ among customer groups and market segments, as appropriate? | 3.0 | | | | | |
| How effectively do your measurements capture actionable information for use in exceeding your customers' expectations and securing your customers' engagement? | 3.0 | | | | | |

| | |
|--|------------|
| <u>2. Satisfaction Relative to Competitors</u> | <u>3.0</u> |
|--|------------|

| | | | | | | |
|---|-----|--|--|--|--|--|
| How do you obtain information on your customers' satisfaction relative to their satisfaction with your competitors? | 3.0 | | | | | |
| How do you obtain information on your customers' satisfaction relative to the satisfaction levels of customers of other organizations providing similar products or to industry | 3.0 | | | | | |

| | |
|---------------------------|------------|
| <u>3. Dissatisfaction</u> | <u>4.0</u> |
|---------------------------|------------|

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|--|-----|--|--|--|--|--|
| How effectively do you determine customer dissatisfaction? | 4.0 | | | | | |
|--|-----|--|--|--|--|--|

How effectively do your measurements capture actionable information for use in meeting your customers' requirements and exceeding their expectations in the future?

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| 4.0 | | | | | |
|-----|--|--|--|--|--|

Score 1-5

3.2 Customer Engagement: How do you engage customers to serve their needs and build

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|-----|
| 2.8 |
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Score how effectively your organization determines product offerings and communication mechanisms to support customers. Describe how your organization builds customer

Score 1-5

1

2

3

4

5

a. Product offerings and customer support

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|-----|
| 3.0 |
|-----|

1. Product Offerings

| |
|-----|
| 4.0 |
|-----|

How effectively do you identify customer and market requirements for product offerings and How effectively do you identify and innovate product offerings to meet the requirements and exceed the expectations of your customer groups and market segments (identified in your How effectively do you identify and innovate product offerings to enter new markets, to attract new customers, and to provide opportunities for expanding relationships with existing customers, as appropriate?

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| 4.0 | | | | | |
| 4.0 | | | | | |
| 4.0 | | | | | |

2. Customer Support

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|-----|
| 5.0 |
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How effectively do you enable customers to seek information and customer support? How effectively do you enable them to conduct their business with you and provide feedback on your products and your customer support? How effective are your key means of customer support, including your key communication How effective do they vary for different customers, customer groups, or market segments? How effectively do you determine your customers' key support requirements? How effectively do you ensure that customer support requirements are deployed to all people and processes involved in customer support?

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|-----|--|--|--|--|--|
| 5.0 | | | | | |
| 5.0 | | | | | |
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| 5.0 | | | | | |
| 5.0 | | | | | |

3. Customer Segmentation

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| 1.0 |
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How effectively do you use customer, market, and product offering information to identify current and anticipate future customer groups and market segments? How effectively do you consider customers of competitors and other potential customers and markets in this segmentation? How effectively do you determine which customers, customer groups, and market segments to pursue for current and future products?

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| 1.0 | | | | | |
| 1.0 | | | | | |
| 1.0 | | | | | |

4. Customer Data Use

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|-----|
| 2.0 |
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How effectively do you use customer, market, and product offering information to improve marketing, build a more customer-focused culture, and identify opportunities for innovation?

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| 2.0 | | | | | |
|-----|--|--|--|--|--|

Score 1-5

1

2

3

4

5

b. Building Customer Relationships

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|-----|
| 2.5 |
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1. Relationship Management

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| 2.0 |
|-----|

How effectively do you market, build, and manage relationships with customers to achieve - acquire customers and build market share

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|-----|--|--|--|--|--|
| 2.0 | | | | | |
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- retain customers, meet their requirements, and exceed their expectations in each stage of the customer life cycle
- increase their engagement with you

2. Complaint Management

How effectively do you manage customer complaints?

How effectively does your customer complaint management process ensure that complaints are resolved promptly and effectively?

How effectively does your customer complaint management process enable you to recover your customers' confidence and enhance their satisfaction and engagement?

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|-----|--|--|--|--|--|
| 2.0 | | | | | |
| 2.0 | | | | | |
| 3.0 | | | | | |
| 3.0 | | | | | |
| 3.0 | | | | | |
| 3.0 | | | | | |