



Gracious Hospitality Service Excellence and Culture Discovery Questionnaire

Pre Engagement Client Assessment

Thank you for considering Gracious Hospitality Services. This questionnaire helps us understand your organization, the people you serve, your current service culture, and the obstacles that may be preventing consistent service excellence. Your responses will guide our discovery conversation and help us recommend training or consulting support aligned with your needs and goals.

Terminology Throughout this questionnaire, customer includes any guest, client, patient, resident, member, tenant, shopper, account holder, or other individual your organization serves.

ORGANIZATION	INDUSTRY OR BUSINESS TYPE
PRIMARY CONTACT AND TITLE	EMAIL AND TELEPHONE
LOCATIONS OR DEPARTMENTS INCLUDED	DATE COMPLETED

Please answer as fully as practical. If a question does not apply, enter N A.

Section 1 Organization and Customers

Establishes the organization's purpose, promise, customers, and definition of excellent service.

1. Briefly describe your organization's mission, core values, and brand promise.

2. Who are your primary customers, and what are their most important needs and expectations?

3. What does excellent customer service mean in your industry and specifically within your organization?

4. What do you want customers to think, feel, or say after interacting with your organization?

5. What distinguishes your desired service experience from that of your competitors or alternatives?

Section 2 Customer Journey and Current Performance

Identifies the most important customer touchpoints and establishes a baseline for current service performance.

6. How do customers interact with your organization? Select all that apply.

☐ In person ☐ Telephone ☐ Email ☐ Website or app ☐ Social media ☐ Third party ☐ Other

7. Which customer touchpoints or moments have the greatest effect on satisfaction, loyalty, referrals, or repeat business?

8. On a scale of 1 to 10, how would you rate your organization's current service quality, and why?

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10

9. What customer feedback do you hear most often, both positive and negative?

10. Which service performance measures do you currently track, and what are those measures telling you?

Examples include satisfaction, complaints, retention, referrals, reviews, response time, sales, or recovery costs.

11. How consistent is the customer experience across departments, locations, shifts, employees, and communication channels?

☐ Highly consistent ☐ Mostly consistent ☐ Inconsistent ☐ Highly inconsistent ☐ Unsure

Section 3 Service Challenges and Pain Points

Pinpoints where service breaks down, what may be causing it, and how the organization is affected.

12. What are the three most common customer complaints, service failures, or sources of frustration?

13. At which points in the customer journey are service problems most likely to occur?

14. Which departments, locations, shifts, roles, or customer channels experience the greatest service inconsistencies?

15. What factors appear to be contributing to these challenges? Select all that apply and explain the most significant factors.

- ☐ Behavior or attitude
 ☐ Communication
 ☐ Staffing
 ☐ Training
 ☐ Processes
 ☐ Technology
 ☐ Policies
 ☐ Leadership
 ☐ Other

16. Please describe one recent customer experience that did not meet your organization's expectations. What happened, and how was it handled?

17. How are these service challenges affecting the organization?

- ☐ Retention
 ☐ Reviews
 ☐ Referrals
 ☐ Revenue
 ☐ Recovery costs
 ☐ Reputation
 ☐ Employee morale
 ☐ Other

Section 4 Leadership and Service Culture

Examines whether service expectations are defined, modeled, reinforced, and sustained throughout the organization.

18. Does your organization have clearly defined service standards or expected service behaviors? If yes, describe them and how they are communicated.

☐ **Yes** ☐ **Partially** ☐ **No** ☐ **Unsure**

19. How consistently do supervisors and senior leaders model the service behaviors expected from employees?

☐ **Consistently** ☐ **Usually** ☐ **Sometimes** ☐ **Rarely** ☐ **Unsure**

20. What are your team's greatest service strengths?

21. What service behaviors, attitudes, or leadership practices would you most like to improve?

22. How are employees recognized or rewarded for delivering exceptional service?

23. How are service expectations reinforced and employees held accountable when standards are not met?

24. What do employees say gets in the way of providing consistently excellent service?

25. Where do you believe your service culture is strongest, and where is it beginning to break down?

Section 5 Employee Empowerment and Service Recovery

Assesses employees' ability, confidence, and support to resolve concerns and restore customer trust.

26. How much authority do employees have to resolve customer concerns without management approval?

☐ Broad authority ☐ Some authority ☐ Limited authority ☐ No authority ☐ Varies by role

27. Is there a consistent process employees are expected to follow when handling complaints or service recovery situations? Please describe it.

☐ Yes ☐ Partially ☐ No ☐ Unsure

28. Do employees feel supported by management when they make reasonable decisions to assist a customer? Why or why not?

29. Which customer concerns or situations are employees least confident handling?

30. When an issue cannot be resolved immediately, how is it escalated, documented, communicated, and followed through to completion?

31. What would help employees take more confident and appropriate action for customers?

Section 6 Training Goals and Measurable Outcomes

Clarifies the desired behavior change, business result, and plan for reinforcing learning after the engagement.

32. What service training has been provided in the past? What worked, what did not, and why?

33. Which areas are the highest priorities for this engagement? Select all that apply, then identify your top three.

- ☐ Attitude
 ☐ Awareness
 ☐ Anticipation
 ☐ Action
 ☐ Communication
 ☐ Empathy
 ☐ Complaint handling
☐ Service recovery
 ☐ Teamwork
 ☐ Leadership
 ☐ Upselling
 ☐ Other

34. If we could solve only one service related problem through this engagement, what should it be, and why?

35. What specific employee behaviors would you like to see more consistently following the training?

36. What measurable improvement would you like to see within 30, 60, or 90 days?

37. How will you determine whether employees are applying the training in their daily work?

38. Who will be responsible for reinforcing service standards and sustaining the desired culture after the training?

39. What specific outcomes would make this engagement a success for employees, customers, and the organization?

Section 7 Participants and Engagement Logistics

Provides the information needed to recommend the appropriate format, level of customization, and implementation approach.

40. How many people are expected to participate, and which roles or leadership levels will be represented?

41. Which roles in your organization interact most frequently or most critically with customers?

42. What is the general experience level and average length of service of the participants?

43. Are turnover, staffing shortages, morale, burnout, or communication between departments affecting service delivery? Please explain.

44. Are there language, generational, cultural, accessibility, or communication considerations that should be incorporated into the program?

45. Which training format or combination of formats would work best?

☐ On site workshop ☐ Virtual classroom ☐ On demand ☐ Leadership session ☐ Blended approach ☐ Unsure

46. What timing, scheduling, operational, or budget parameters should be considered?

47. Who should participate in the discovery conversation and the final decision regarding the engagement?

48. Is there anything else we should understand about your organization, customers, culture, or goals?

Thank you for sharing this information. Your responses will remain confidential and will be used to guide our discovery conversation and engagement recommendations.