PERFORMANCE REVIEW

CUSTOMER SUCCESS

TEMPLATE

WILDBIT

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CREWMOJO

Enabling performance experiences to be designed and delivered in days not months.
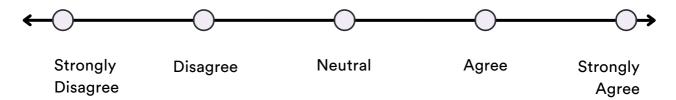
Use these templates for inspiration or as a starting point for your own system. When you need to automate and scale the process, each template is ready to go in the Crewmojo platform.

Take a personal tour of Crewmojo.

Welcome to our Customer Success feedback and review template. We believe Customer Success team members play a pivotal role in the growth of our organisation and reputational brand in the market.
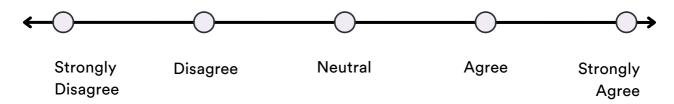
This person cares deeply about making customers successful

- They are an advocate and champions of each and every customer.
- They approach each interaction with a fresh mindset and attitude.
- They recognize the uniqueness of each customer and always look for a way to both educate and learn from the customer.

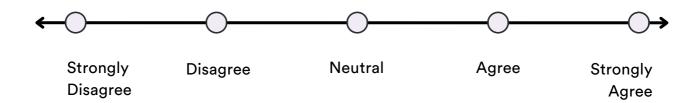Strongly Disagree — Disagree — Neutral — Agree — Strongly Agree

This person maintains composure when dealing with a difficult customer

- They understand that everyone has bad days and does not let that one negative experience ruin their day.
- They work from a place of empathy and empower the customer to resolve their problem, rather than blaming them for having the problem in the first place.

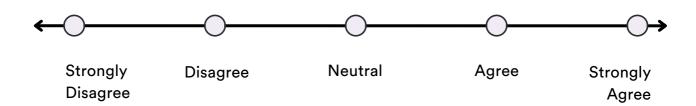Strongly Disagree — Disagree — Neutral — Agree — Strongly Agree

This person empowers customers and follows up proactively

- They empower customers by taking the time to educate them.
- They follow through with customers and keep them updated.
- They don't leaves customers wondering if they were forgotten.

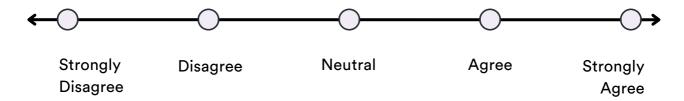Strongly Disagree — Disagree — Neutral — Agree — Strongly Agree

This person thoroughly researches customer problems before giving a response

- They look for ways to improve the customer's experience with the product.
- They are familiar with available documentation and use it to help customers accomplish their goal or job to be done.
- They look for opportunities to improve existing educational material and create new materials when none exist.
- They avoid using existing documentation as a way to cut corners in replying to customers.
- They avoid using documentation to treat every problem the same when we know that every user has a unique need

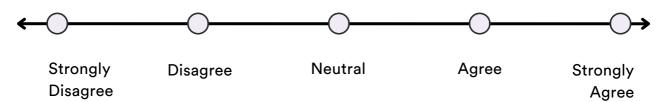Strongly Disagree — Disagree — Neutral — Agree — Strongly Agree

This person is a high impact communicator between customers and employees

- They are a front line to the entire organisation and communicate customer frustrations, requests, and compliments to the right people.
- They know what we are working on, how this will affect users, and they know how to communicate this effectively to customers.
- They are proactive in reaching out to customers and know when this is appropriate.
- They ensure they find out about releases before customers.

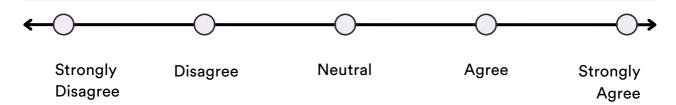Strongly Disagree — Disagree — Neutral — Agree — Strongly Agree

This person knows how to balance their own knowledge with asking for help

- They know where to find information and how to combine resources to track down problems like a bloodhound
- They know when and how to ask for help from teammates to minimize the support workload for everyone.
- They don't ask customers or developers for information they can easily find on their own.
- They don't assign an issue to a developer without having taken the time to work through the problem to attempt to understand and solve it.
- They don't ask customers questions that have already been answered, or that can be easily discovered.

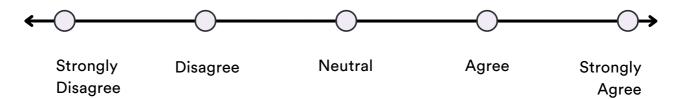Strongly Disagree — Disagree — Neutral — Agree — Strongly Agree

This person communicates with customer-friendly language

- They use conversational language and tone.
- They communicate with customers using clear and concise writing to ensure the best resolution.
- They explain workflow steps in clear and plain terms rather than shorthand or internal jargon.

Strongly Disagree — Disagree — Neutral — Agree — Strongly Agree

This person focuses on the right measurements

- They monitor metrics to understand customer happiness.
- They focus on customer engagement with their products.
- They avoid metrics that value quantity over quality.
- They don't race to the end of their day by quickly answering questions.

Strongly Disagree — Disagree — Neutral — Agree — Strongly Agree

EXPLORE MORE

Building a world-class performance culture is made easy with our template library and pre-designed employee experiences.

Templates:
- One-on-one templates
- Performance review templates
- Role descriptions
- Goal templates
- Survey templates
- Engagement surveys
- and more

Experiences:
- Onboarding new employees
- Goal setting & alignment
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