

Client-Centric Satisfaction Tool

Thank you for participating in our Client-Centric Satisfaction Process. Following are the steps to get the process started.

Date:	Client Organization:	Scope of Service/Description:
Client Contact:		
Service Delivery Lead:		Sales Lead:

1. Review the list of common satisfaction factors.
2. Choose the five factors most relevant to the engagement.
3. Enter the five factors below.
4. Choose and enter weights for each of the chosen factors.
5. Set the date for choosing the ratings and reviewing performance.

Client Satisfaction Factors	Business Model Understanding	Deep experience in the customer's business model.
	Quality of Deliverables	Deliverables meet all acceptance criteria.
	Meeting Deadlines	Deliverables are accepted as meeting agreed-to dates.
	Expense Control	Expenses are clearly outlined in advance and stay within budget.
	Communications	Communication flows smoothly, comprehensively and accurately.
	Responsiveness	Efficient and timely completion of client requests.
	Foresight	Proactive anticipation of client needs.
	Knowledge Transfer	Effective transferal of information and knowledge.
	Behavior	Meeting all expectations of standards of reliability, integrity and professionalism.
	Team Play	Effective embodiment of team goals—behavior, attitude and interaction.
	Autonomy	Operational effectiveness with minimal client interaction and disruption.
	Productivity	Reasonable levels of utilization of resources and assets to accomplish tasks.
	Compliance	Actions, processes and conduct meet all predefined client standards.

Satisfaction Factors

Weight (1–5)

1.	_____	
2.	_____	
3.	_____	
4.	_____	
5.	_____	

***Weight Scale:** Importance on a scale of 1–5, where 1=Nice to have, 5=Critical.



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Use the tool below to provide the ratings for the chosen satisfaction factors and performance evaluation.

Date:	Client Organization:	Scope of Service/Description:	
Service Delivery Lead:		Sales Lead:	
Satisfaction Factors:			
	Weight (1-5)	Rating (1-5)	Weight × Rating
1. _____	□	□	□
2. _____	□	□	□
3. _____	□	□	□
4. _____	□	□	□
5. _____	□	□	□
Total (a) →	□	Total (b) →	□
Review Date:		Average Rating (b/a) →	□
Evaluating Performance			
Date:	Client Representative:	Selling Organization Representative:	
Comments:			

Weight Scale: Importance on a scale of 1-5, where 1=Nice to have, 5=Critical.

Rating Scale: 1=Corrective Action needed, 2=Improvement needed, 3=Acceptable, 4=Good, 5=Excellent