

Customer Service Checklist

A checklist for handling support interactions and meeting service standards from greeting to follow-up.

Prepare for the Interaction

- Review the customer's history and any open tickets before responding.
- Confirm you have the tools, macros and knowledge base ready.
- Check service-level targets so you know the response window.
- Clear distractions so you can give the customer full attention.
Context before contact prevents 'can you repeat that' moments.

Greet and Connect

- Greet the customer warmly and use their name.
- Introduce yourself and confirm you are here to help.
- Match the customer's tone and acknowledge any frustration.
- Set a positive, professional tone from the first line.
- Verify identity politely when account access is involved.

Understand the Issue

- Let the customer explain fully without interrupting.
- Ask clarifying questions to pinpoint the real problem.
- Restate the issue back to confirm you understood it.
A quick recap stops you from solving the wrong problem.
- Show empathy and acknowledge the impact on the customer.
- Gather any details or screenshots needed to resolve it.

Resolve and Take Action

- Offer a clear solution or explain the next steps.
- Set realistic expectations on timing and any limitations.
- Escalate to the right team if the issue is beyond your scope.
- Take ownership and avoid passing the customer around.
- Confirm the customer is satisfied that the issue is resolved.
- Offer a proactive tip to prevent the problem recurring.

Close and Follow Up

- Summarize what was done and what happens next.
- Ask if there is anything else you can help with.
- Thank the customer for their time and patience.
- Send a follow-up to confirm the fix held, if needed.
A short check-in turns a fix into a loyalty moment.
- Invite feedback or a satisfaction rating on the interaction.

Document and Improve

- Log the interaction and resolution accurately in the system.
- Tag the issue type so trends can be tracked over time.
- Update the knowledge base if you found a gap or a better answer.
- Flag recurring problems to the relevant team for a root-cause fix.

- Review your own interactions against the service standards weekly.
Self-review against the checklist speeds up coaching.