

SANDLER®

# Sandler's Strategic Customer Care

February 12, 2026

CHESA



# On the Frontlines

## Do you know..

- **80%** of 2,049 US adults surveyed decided **never to go back** to a business/organization after a bad customer service experience?
- **60%** indicated that the main reason for recommending a company was **“outstanding service”**?
- **100%** of your customers are on **your competitors’ prospecting list**?
- Which ones are susceptible to leaving and why?

Score each statement with the number that reflects how much you agree that it describes what happens at CHESA!

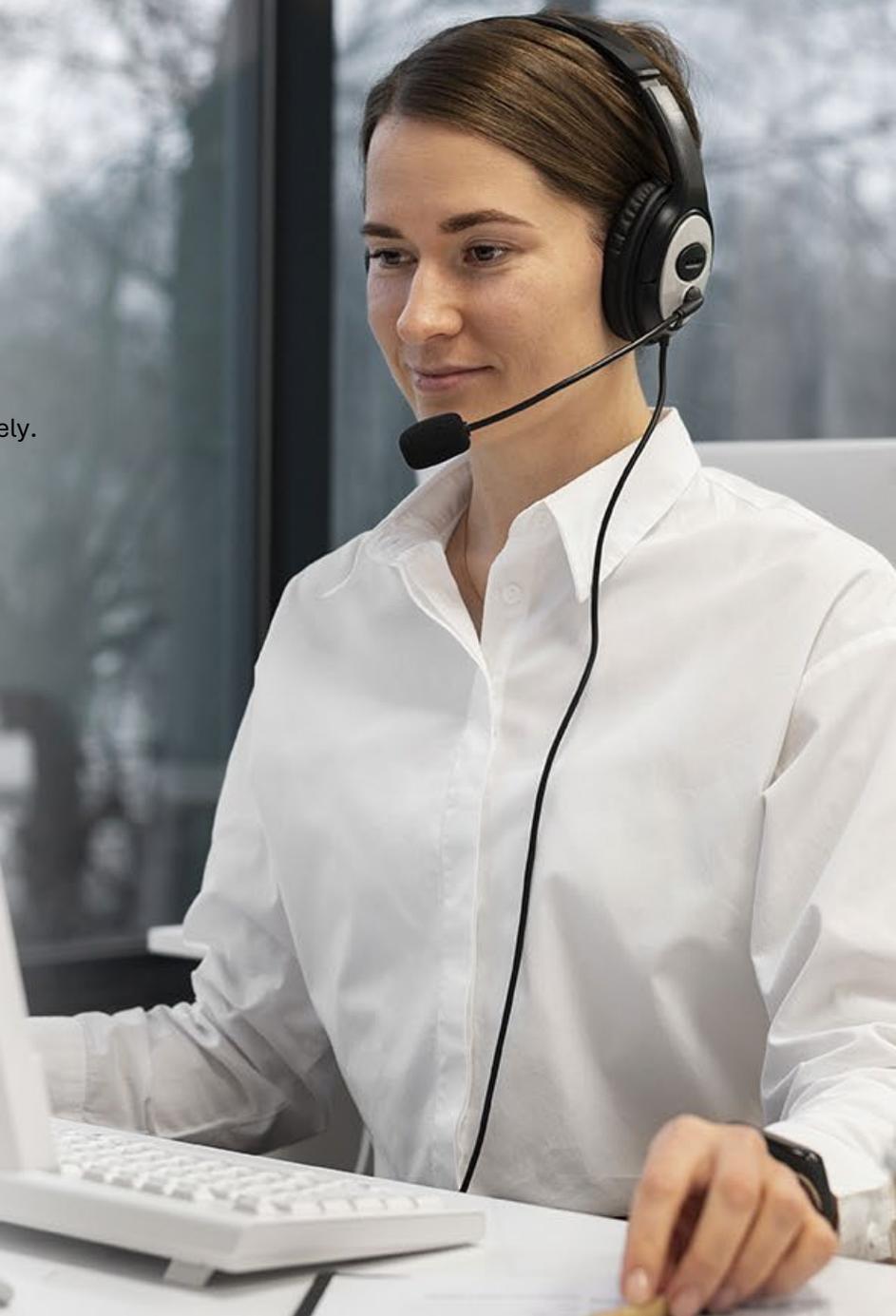
**Scale:** 0 - Strongly Disagree; 1 - Disagree; 2 - Sometimes; 3 - Agree; 4 - Strongly Agree

- \_\_\_\_\_ 1. People in your organization consistently under-promise and over-deliver.
- \_\_\_\_\_ 2. Difficult customers are not treated like a "hot potato" and passed off to someone else.
- \_\_\_\_\_ 3. Customer complaints are resolved quickly, responsively, and competently.
- \_\_\_\_\_ 4. Follow-up with customers is prompt, consistent, and thorough.
- \_\_\_\_\_ 5. On incoming calls, employees take responsibility for ensuring the customer is tended to promptly and effectively.
- \_\_\_\_\_ 6. Your company has a clear, step-by-step process for dealing with difficult people and difficult situations.
- \_\_\_\_\_ 7. All employees are fully trained in how to meet customer expectations.
- \_\_\_\_\_ 8. Your company has a consistent and clearly defined policy for customer care.
- \_\_\_\_\_ 9. Customer issues don't escalate to where a manager must step in to resolve them.
- \_\_\_\_\_ 10. When your company encounters negative feedback, there is a process in place to act and follow up.
- \_\_\_\_\_ 11. Your company has a convenient way to get customer feedback on poor or exceptional service.
- \_\_\_\_\_ 12. You have never lost a customer due to lack of service.
- \_\_\_\_\_ 13. Your company often records and reviews customer calls and client interactions for coaching purposes.
- \_\_\_\_\_ 14. Your frontline staff asks for, and receives, help and support when needed.
- \_\_\_\_\_ 15. Your company brainstorms ideas for growing better service from all departments.
- \_\_\_\_\_ 16. Your frontline staff is empowered to take personal responsibility for the satisfaction of customers.
- \_\_\_\_\_ 17. Internal customers are treated as professionally and as responsively as external customers.
- \_\_\_\_\_ 18. Frontline staff listens to, and questions, customers in order to understand what they want.
- \_\_\_\_\_ 19. Frontline staff places customers' needs ahead of rigid policy.
- \_\_\_\_\_ 20. Company customer care policies are regularly reviewed for rigidity and updated if required.
- \_\_\_\_\_ 21. Customer issues not resolved in the moment are tracked and followed up thoroughly.

**Total Score**

**Total Score Notes**

- 0-28: Frontline systems need a serious tune-up.
- 29-55: You are doing a good job; still need work.
- 56-84: Great customer care, congratulations! Keep working to be the best!



# Strategic Customer Care Lessons

1. On the Frontlines
2. Effective Communication
3. Breaking through Your Comfort Zone
4. Up-Front Contracts
5. Understanding Our Customers: DISC
6. Questioning Techniques
7. Up-Selling and Cross-Selling
8. Telephone and Email Communication
9. Understanding Our Customers: Transactional Analysis
10. Dealing with Difficult People
11. Formula for Success
12. Client Development through Sales