Positioning UWI to Lead through Service Excellence

Mystery shopping

PULSE Checklist

Category	Criteria	Scenario medium			Observations: Standard met …		
		In-person	Phone	Email	Fully	Partially	Not at all
Contact/ Access							
1. Signage/ Directions/ Access	1.1 Was office signage visible?	✓			Signage easy to see and read	Signage partly hidden and/or difficult to read	Signage not in place
	1.2 Was office signage clear?	✓			Signage easy to understand	Some aspects of signage confusing/ unclear	Signage difficult to understand
	1.3 Was access to the office unobstructed?	✓			Unobstructed access to the office	Office access partly obstructed	Office inaccessible
2. Contact information	2.1 Was full contact information published on unit's website?	✓	✓	✓	Email address, telephone number(s), location and office hours published on website	Only some contact details published on website (up to 3)	No contact details published on website
	2.2 Was full contact information posted on unit's office door?	✓			Email address, telephone number(s) and office hours posted on office door	Only some contact details posted on office door (up to 2)	No contact details posted on office door
	2.3 Was published contact information current?	✓	✓	✓	Made contact using published contact information	-	Unable to make contact using published contact information
3. Email signatures	3.1 Did email signature provide full contact information?			✓	Signature included employee's name and department	Signature excluded either employee's name OR department	No signature or signature excluded both employee's name AND department
4. Availablity (by phone, in person)	4.1 Were employees available during published office hours?	✓	✓		Employee(s) available when you attempted initial contact	-	No employees were available when you attempted initial contact
5. Out-of-office notification	5.1 (If applicable) Did out-of-office notification provide alternative contact details?			✓	Notification included alternative name and contact details (email and/or phone)	Notification included either alternative name OR contact details (email or phone) ONLY	No out-of-office notification provided

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		In-person	Phone	Email	Fully	Partially	Not at all
Customer Request/ Inquiry							
6. Responsiveness by phone	6.1 Was the telephone answered within 3 rings?		✓		Telephone answered within 3 rings	Telephone answered after 3rd ring	Telephone not answered
7. Communication	7.1 Were you greeted courteously and professionally (in person or by phone)?	✓	✓		Employee offered time-appropriate salutation and offered to help	Employee either offered time-appropriate salutatation OR offered to help ONLY	Employee offered neither salutation nor help
	7.2 Did email(s) include an appropriate salutation (e.g. Dear …; Good morning …) and closing (e.g. Best regards ...; Sincerely …)			✓	Employee email included both an appropriate salutation AND closing	Employee email included either an approriate salutation or appropriate closing ONLY	Employee email did not include an appropriate salutation or closing
	7.3 Was the employee's written or spoken communication courteous and professional?	✓	✓	✓	Employee addressed you by name or title AND used polite expressions (thank you, sorry, please, etc.)	Employee did not address you by name or title, OR did not use polite expressions	Employee did not address you by name or title AND did not use polite expressions
	7.4 Was the employee's body language polite/ courteous?	✓			Employee consistently maintained eye contact, respected your personal space, and maintained an upright or open posture	Employee sometimes made eye contact, respected your personal space, and/or maintained an upright or open posture	Employee did not maintain eye contact, did not respect your personal space AND did not maintain an upright or open posture

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		In-person	Phone	Email	Fully	Partially	Not at all
Customer Request/ Inquiry (Cont'd)							
8. Attentive listening & thoughtful response (initial inquiries)	8.1 Did the employee listen attentively to your initial inquiry/ request?	✓	✓		Employee allowed you to make your initial query or explain your needs fully and without interruption	Employee interrupted your initial inquiry or request	Employee did not allow you to make an initial inquiry or request
	8.2 Did the employee respond thoughtfully to your initial inquiry/ request in person or by phone?	✓	✓	✓	Employee demonstrated strong interest / sympathy AND eagerness to assist regarding your inquiry/ request	Employee demonstrated some interest in assisting with your inquiry/ request	Employee dismissed your inquiry/ request or showed disinterest
9. Timely acknowledgement of requests/ inquiries	9.1 Did the employee acknowledge/ thank you for your request/ inquiry immediately (in person or by phone)?	✓	✓		Employee acknowledged/ thanked you for your request/ inquiry at the time it was made	Employee acknowledged/ thanked you for your request/ inquiry at a later time/ date	Employee did not acknowledge/ thank you for your request/ inquiry
	9.2 Did the employee acknowledge/ thank you for your request/ inquiry within 24 working hours (by email)?			✓	Employee acknowledged/ thanked you for your email request/ inquiry within 24 working hours	Employee acknowledged/ thanked you for your email request/ inquiry after 24 working hours	Employee did not acknowledge/ thank you for your email request/ inquiry
10. Provision of estimated response time and updates (requests with lead times)	10.1 Did the employee provide an estimated time for response to your request?	✓	✓	✓	Employee confirmed details of deliverables (what would be provided) and delivery time	Employee confirmed details of either deliverables OR delivery time ONLY	Employee provided no details of deliverables OR delivery time
	10.2 If applicable, did the employee advise you in advance of changes to the estimated delivery time or deliverables?	✓	✓	✓	Employee provided notice of changes before the promised delivery time	Employee advised of changes at the promised delivery time	Employee advised of changes after the promised delivery time

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		In-person	Phone	Email	Fully	Partially	Not at all
Response/ Delivery to Customers							
11. Provision of information or documentation	11.1 Did the employee provide up-to-date, accurate and relevant information or documentation?	✓	✓	✓	Employee provided information or documentation that was up-to-date, accurate and relevant	Employee provided information or documentation that fulfilled one or two requirements ONLY (up-to-date, accurate, relevant)	Employee provided no information or documentation, or provided information or documentation that fulfilled none of the requirements
12. Confirmation of customer satisfaction and advice on further support	12.1 Did the employee check that the information/ service provided was helpful to you, and give options for further support?	✓	✓	✓	Employee asked if the information/ service provided was helpful AND provided options for further support	Employee either asked if the information/ service provided was helpful OR provided options for further support ONLY	Employee did not ask if the information/ service provided was helpful AND did not provide options for further support
13. Customer referral & follow-up	13.1 If referral required, did the employee provide contact details and alert the relevant department? (specified departments?)	✓	✓	✓	Employee provided contact information for relevant department and made initial contact to provide background information on your request	Employee provided contact information for relevant department OR made initial contact ONLY	Employee did not provide contact information for relevant department and did not make initial contact on your behalf