



ASSESSMENTS

PROGRAM GUIDE

Understand the gap. Identify the priority.
Build the right solution.

WHY TSSI USES ASSESSMENTS

TSSI assessments are designed as practical diagnostics. They help businesses and teams identify where systems, people, communication, service, sales, follow-up, or training may need attention before time and money are invested in a solution.

THE SERVICE STANDARD INSTITUTE

Business Growth | Workforce Training | Customer Experience | Sales & Retention



Six Assessments. One Purpose.

To help an organization make better decisions by diagnosing the current state before prescribing training, consulting, or process changes.

ASSESS

IDENTIFY

PRIORITIZE

IMPROVE

TSSI Assessment Menu

01

Customer Experience Assessment

See the experience through your customer's eyes.

02

Sales Process Assessment

Find out whether your sales process is repeatable - or dependent on chance.

03

Follow-Up Assessment

Because "not yet" should not automatically become "never."

04

Workforce Readiness Assessment

Measure whether your team is prepared to perform - not just present.

05

Training Needs Assessment

Train what the team actually needs - not what sounds good on paper.

06

Organizational Performance Review Assessment

Look beyond one department and evaluate how the business works together.

IMPORTANT

These assessments are diagnostic tools - not pass/fail exams. Results are intended to guide conversation, identify priorities, and support better next-step decisions.

ASSESSMENT 01

Customer Experience Assessment

See the experience through your customer's eyes.

WHY THIS ASSESSMENT MATTERS

A growing business can lose customers even when its product or service is strong. This assessment identifies where the customer journey may feel inconsistent, unclear, slow, impersonal, or difficult.

What It Entails

- Customer journey consistency from first contact through post-service follow-up
- Communication standards, response times, tone, and professionalism
- Expectation setting, service recovery, and complaint handling
- Ease of doing business, handoffs, and customer friction points
- Feedback practices and how customer insight is used to improve service

Desired Outcomes

- A clearer picture of the customer experience strengths and gaps
- Priority areas that can improve trust, satisfaction, and repeat business
- Recommended service standards and customer journey improvements
- A practical starting point for customer experience training or process redesign

BEST FOR

Owners, managers, customer-facing teams, service businesses, healthcare, property services, transportation, tax, staffing, and other organizations where the customer relationship affects revenue.

NEXT STEP: Review your results with TSSI and identify the highest-priority action.

ASSESSMENT 02

Sales Process Assessment

Find out whether your sales process is repeatable - or dependent on chance.

WHY THIS ASSESSMENT MATTERS

Sales can become inconsistent when there is no clear path from lead to decision. This assessment reviews whether your team has a defined, human-centered process that helps prospects move forward without sounding scripted or robotic.

What It Entails

- Lead handling, discovery, qualification, and needs diagnosis
- Sales conversation structure and the quality of questions being asked
- Value communication, objection handling, and decision-making steps
- Closing practices, next-action ownership, and sales accountability
- CRM usage, documentation, and consistency across team members

Desired Outcomes

- Visibility into where prospects stall or fall out of the sales process
- A stronger structure for discovery, presentation, follow-up, and closing
- More consistent language and expectations across the sales team
- Action steps to improve conversion without replacing human connection

BEST FOR

Business owners, sales leaders, sales representatives, service-based companies, and organizations with inconsistent close rates or an undefined sales process.

NEXT STEP: Review your results with TSSI and identify the highest-priority action.

Follow-Up Assessment

Because “not yet” should not automatically become “never.”

WHY THIS ASSESSMENT MATTERS

Many opportunities are lost after the first conversation. This assessment looks at what happens after a lead, inquiry, proposal, quote, missed call, or customer interaction and whether follow-up is intentional, timely, and owned by someone.

What It Entails

- Follow-up timing, frequency, channels, and ownership
- Lead status definitions and next-action discipline
- Email, phone, text, and CRM follow-up practices
- Proposal, quote, and no-response follow-up procedures
- Re-engagement of dormant leads and prior customers

Desired Outcomes

- A clear view of where revenue is being left in the follow-up gap
- A practical follow-up cadence and accountability structure
- Improved lead organization and next-step visibility
- A foundation for more consistent conversations and recovered opportunities

BEST FOR

Businesses with a growing lead list, long sales cycles, quotes that go unanswered, low response rates, or teams that are unsure who should follow up and when.

NEXT STEP: Review your results with TSSI and identify the highest-priority action.

Workforce Readiness Assessment

Measure whether your team is prepared to perform - not just present.

WHY THIS ASSESSMENT MATTERS

Hiring people does not automatically create a ready workforce. This assessment evaluates whether employees have the clarity, skills, support, standards, and accountability needed to perform their roles effectively.

What It Entails

- Role clarity, onboarding quality, and job expectations
- Communication, professionalism, reliability, and workplace readiness
- Customer-facing and team-facing performance standards
- Leadership support, coaching, accountability, and feedback
- Skill gaps that may affect service, productivity, retention, or confidence

Desired Outcomes

- A workforce-readiness snapshot for leaders and teams
- Identification of immediate training and performance priorities
- Clearer expectations for onboarding, professionalism, and service standards
- A roadmap for strengthening employee confidence, consistency, and accountability

BEST FOR

Employers, supervisors, workforce programs, growing teams, organizations with new hires, and companies experiencing inconsistency in professionalism, communication, or service delivery.

NEXT STEP: Review your results with TSSI and identify the highest-priority action.

ASSESSMENT 05

Training Needs Assessment

Train what the team actually needs - not what sounds good on paper.

WHY THIS ASSESSMENT MATTERS

Training is most effective when it addresses a defined gap. This assessment helps determine what employees already know, what they need to improve, and which training topics are most likely to create measurable workplace impact.

What It Entails

- Current employee knowledge, confidence, and skill levels
- Performance gaps that may be corrected through training or coaching
- Priority topics such as customer service, sales, communication, leadership, onboarding, and workforce development
- Audience needs, delivery format, and practical application requirements
- Post-training reinforcement and accountability needs

Desired Outcomes

- A prioritized training plan instead of a one-size-fits-all program
- Better alignment between training investment and business goals
- Recommendations for individual, team, or customized learning
- A clearer basis for measuring whether training changed workplace behavior

BEST FOR

Organizations planning training, employers with recurring performance concerns, leaders preparing for growth, and teams that need a customized development plan.

NEXT STEP: Review your results with TSSI and identify the highest-priority action.

Organizational Performance Review Assessment

Look beyond one department and evaluate how the business works together.

WHY THIS ASSESSMENT MATTERS

Some performance problems are not isolated to sales, customer service, or training. This broader review looks at how leadership, people, processes, communication, service, and accountability work together across the organization.

What It Entails

- Business and operational alignment across departments or functions
- Leadership communication, decision-making, and accountability
- Workflow clarity, handoffs, bottlenecks, and process consistency
- Customer, employee, and revenue-impacting performance patterns
- Opportunities for stronger systems, standards, training, and follow-through

BEST FOR

Desired Outcomes

- A high-level view of organizational strengths and performance gaps
- Identification of cross-functional issues that may be limiting growth
- Priority recommendations for systems, training, service, sales, or leadership
- A practical basis for a phased performance-improvement plan

Growing companies, leadership teams, organizations experiencing repeated breakdowns across departments, and businesses that need a broader diagnosis before investing in solutions.

NEXT STEP: Review your results with TSSI and identify the highest-priority action.



What Happens After the Assessment?

1

Review the Findings

Look at the strongest areas, the gaps, and the patterns that may be affecting customers, employees, or revenue.

2

Identify the Priority

Not every issue needs to be addressed at once. TSSI helps separate urgent needs from longer-term opportunities.

3

Choose the Right Solution

The next step may be training, a sales or follow-up strategy, customer experience improvement, leadership support, or a broader business-growth engagement.

4

Build for Implementation

The goal is not simply to collect information. The goal is to turn the findings into clearer standards, stronger conversations, and practical action.

Ready to turn the assessment into a plan?

Book a TSSI Strategy Session to review priorities and next steps.

BOOK A STRATEGY SESSION

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