Organisational or Business Strategy

	Disagree	Neutral	Agree
1 In our purpose and mission, our customers are the focus, not just our services and processes.			
2 Our mission clearly describes how we would like to treat customers and/or the experience they receive from our services.			
3 Customer advocacy is one of our main goals .			
4 Empathy for the customer is extremely important in our organisation.			
5 Employees are given the space to satisfy customer's wishes.			
6 The management team spends half of its time on activities that involve customers.			
7 We do not evaluate our organisation's performance solely on the basis of financial results.			
	...x 0	...x 0.5	...x 1
Total Score =			

Customer Strategy (known intent with groups of customers)

	Disagree	Neutral	Agree
1 We have true insight into the way that meaningful relationships with our customers develop.			
2 We are able to identify when a relationship is developing in the wrong way before it is too late.			
3 We build enough positive moments into the relationship development and not only operationally oriented or efficient.			
4 We are capable of engaging in customer engagement and marketing activities at strategic moments (for the customer).			
5 Customer information is structurally and consistently shared between departments which have contact with the customer.			
6 Our employees' performance is evaluated in part on the basis of their degree of customer orientation.			
7 Employees with customer contact have an affinity for systems and access to customer data.			
	...x 0	...x 0.5	...x 1
Total Score =			

Channels and Engagement

	Disagree	Neutral	Agree
1 We have insight into our customers' communication preferences.			
2 There are objectives for different customer contact moments included in the communication plan.			
3 The mix of communication channels is not dominated by technical possibilities.			
4 We are able to identify the customer during each contact moment and have full customer knowledge at our disposal.			
5 Our service and that of our partners* is flexible enough to satisfy our customers' needs.			
6 Partners* are co-operation-minded and voluntarily share customer data with us.			
7 We know exactly how customer-oriented the partners* have positioned themselves.			
	...x 0	...x 0.5	...x 1
* Partners are third parties that are contracted by our organisation to support us			
Total Score =			

Data management (customer knowledge)

	Disagree	Neutral	Agree
1 We have a clear strategy for processing and maintaining customer information.			
2 Acquisition of customer data is an important component of our company processes.			
3 All of the data that are necessary to implement the strategy are available.			
4 Employees are familiar with the available data and actively use these.			
5 Data are protected (both in terms of privacy issues and security) and this is guaranteed for external parties.			
6 Available data are relevant, up to date, accurate, complete and consistent.			
7 People employed in the IT (roles) also have an understanding of the customer value and experience .			
	...x 0	...x 0.5	...x 1
Total Score =			

Operational management (supplying customisation)

		Disagree	Neutral	Agree
1	We can offer customers various elements of our products and services tailored to their needs.			
2	The quality of our services does not interfere with our relationship with the customer.			
3	In all of our operational activities, the customer's comfort and ease are high on our list or priorities; we do not automatically choose efficiency above all else.			
4	Customers are involved in the development of new products and services.			
5	During employee Recruitment, Selection and Training, there is plenty of focus on customer-orientation.			
6	The organisation is capable of identifying future needs of individual customers and of addressing these needs.			
7	Employee satisfaction (on all levels) is extremely important to the organisation.			
		…x 0	…x 0.5	…x 1
	Total Score =			

Total your scores and add them onto the diagram below. This will give you an overall picture of where your organisation is, in terms of Customer Relationship Management. This might give you some tips on where to start you improvement approach.