



Customer Service Training Checklist: Retail Staff Performance & Sales Techniques

Greeting & Approach

Assessing initial customer interaction and creating a welcoming environment.

Initial Greeting Style

- ☐ Warm and Enthusiastic
- ☐ Friendly and Approachable
- ☐ Professional and Efficient

Time Taken to Acknowledge Customer (seconds)

Eye Contact During Greeting?

- ☐ Consistent
- ☐ Occasional
- ☐ Minimal

Standard Greeting Phrase Used?

Body Language?

- ☐ Open and Inviting
- ☐ Neutral
- ☐ Closed/Unapproachable

Observer Notes on Initial Approach

Write something...

Product Knowledge & Recommendations

Evaluating staff's understanding of products and ability to provide relevant suggestions.

Number of Product Categories Familiar With

Enter a number...

Which product categories can you confidently discuss?

- ☐ Clothing
- ☐ Shoes
- ☐ Accessories
- ☐ Home Goods
- ☐ Electronics

Describe a time you successfully recommended a product to a customer.

Write something...

Rate your confidence in recommending new arrivals.

- ☐ Very Confident
- ☐ Confident
- ☐ Neutral
- ☐ Unsure
- ☐ Not at all

Name a key feature of Product A

Write something...

Active Listening & Needs Identification

Measuring skill in understanding customer requests and identifying underlying needs.

Describe the customer's initial request in detail.

Write something...

What cues (verbal or non-verbal) did the customer display suggesting additional needs or concerns?

Write something...

Did the employee ask clarifying questions to fully understand the customer's needs?

- ☐ Yes
- ☐ No
- ☐ Partially

Approximately how many clarifying questions were asked?

Enter a number...

Did the employee accurately paraphrase the customer's needs to confirm understanding?

- ☐ Yes
- ☐ No
- ☐ Not Observed

Describe any instances where the employee failed to identify the customer's underlying needs.

Write something...

Handling Objections & Concerns

Assessing techniques for addressing customer doubts and finding solutions.

Describe a common customer objection you're likely to encounter.

Write something...

Explain your approach to addressing that objection. (Explain your response)

Write something...

Rate your confidence (1-10) in handling this specific objection.

Enter a number...

What is the best response when a customer asks about a competitor's lower price?

- ☐ Immediately match the price.
- ☐ Highlight the superior quality of our product.
- ☐ Acknowledge the price, but emphasize our value-added features.
- ☐ Politely redirect the customer to research more.

Which of the following are good strategies for de-escalating a frustrated customer?

- ☐ Interrupt the customer to get your point across.
- ☐ Listen actively and show empathy.
- ☐ Offer a sincere apology, even if you're not at fault.
- ☐ Escalate the situation to a manager immediately.

Provide an example of how you're going to communicate empathy to the customer.

Write something...

Sales Techniques & Upselling/Cross-selling

Evaluating sales strategies and ability to increase transaction value.

Average Transaction Value Increase (Upselling)

Enter a number...

Number of Cross-Sell Opportunities Identified per Shift

Enter a number...

Preferred Upselling Technique (e.g., feature comparison, value proposition)

- ☐ Feature Comparison
- ☐ Value Proposition
- ☐ Benefit-Oriented Approach
- ☐ Other

Product Bundles Staff are Comfortable Promoting

- ☐ Bundle A
- ☐ Bundle B
- ☐ Bundle C
- ☐ No Preference

Example Upselling Script Used

Write something...

Notes on Customer Reactions to Upselling Attempts

Write something...

Point of Sale (POS) System Proficiency

Checking accuracy and efficiency in processing transactions.

Transaction Count (per shift)

Enter a number...

Average Transaction Time (seconds)

Enter a number...

Scanner Usage

- ☐ Always Used
- ☐ Frequently Used
- ☐ Occasionally Used
- ☐ Rarely Used

Payment Methods Processed

- ☐ Cash
- ☐ Credit Card
- ☐ Debit Card
- ☐ Gift Card
- ☐ Mobile Payment (e.g., Apple Pay)

Coupon/Discount Application

- ☐ Always Accurate
- ☐ Mostly Accurate
- ☐ Sometimes Inaccurate
- ☐ Frequently Inaccurate

Returns/Voids Handling

- ☐ Always Performed Correctly
- ☐ Mostly Correct
- ☐ Sometimes Incorrect
- ☐ Frequently Incorrect

Returns & Exchanges Procedures

Ensuring correct handling of returns and exchanges according to company policy.

Reason for Return/Exchange

- ☐ Defective Product
- ☐ Wrong Size
- ☐ Changed Mind
- ☐ Damaged in Transit
- ☐ Other

Quantity Returned/Exchanged

Desired Resolution

- ☐ Refund
- ☐ Exchange for Same Item
- ☐ Exchange for Different Item

Return/Exchange Date

Additional Notes (if any)

Write something...

Condition of Returned Item

- ☐ New with tags
- ☐ Used – Excellent Condition
- ☐ Used – Fair Condition
- ☐ Used – Poor Condition

Professionalism & Communication Skills

Observing overall demeanor, verbal and non-verbal communication, and problem-solving abilities.

Eye Contact Frequency (Scale of 1-5)

Enter a number...

Voice Tone & Clarity

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Needs Improvement

Describe Non-Verbal Communication (e.g., posture, facial expressions)

Write something...

Active Listening - Paraphrasing Skills

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Needs Improvement

Time Taken to Respond to Customer Queries (approx.)

Note any instances of unprofessional language used (if applicable)

Write something...

Company Policies & Procedures

Verifying knowledge and adherence to store-specific guidelines.

Review of Employee Handbook

Write something...

Dress Code Compliance

- ☐ Compliant
- ☐ Needs Improvement
- ☐ Non-Compliant

Loss Prevention Procedures Acknowledgment

- ☐ Acknowledged
- ☐ Needs Review

Employee ID Number

Enter a number...

Date of Policy Review Completion

Enter date...

Confidentiality Agreement Items Covered

- ☐ Customer Data Protection
- ☐ Financial Information
- ☐ Proprietary Business Strategies

Customer Feedback & Continuous Improvement

Promoting a culture of soliciting and acting on customer feedback to enhance service.

Overall Customer Satisfaction (1-5)

Enter a number...

What did the customer specifically enjoy about their experience?

Write something...

What could be improved about the service?

Write something...

Which of the following aspects of the experience were relevant?

- ☐ Product Knowledge
- ☐ Staff Friendliness
- ☐ Speed of Service
- ☐ Store Cleanliness
- ☐ Problem Resolution

How likely are you to recommend our store to a friend?

- ☐ Very Likely
- ☐ Likely
- ☐ Neutral
- ☐ Unlikely
- ☐ Very Unlikely

Date of Interaction

Enter date...