Customer Learnings | *Customer Expectations*

Post Mortem/Lessons Learned:
Judgment Free Zone

Operations

What's your overall account feedback?

What triggered this outcome? And why?

Were all company processes followed? Such as proper staff, management, scope/schedule/visit logs. If not, why?

Are there any internal processes that need review/improvement?

Are there any immediate steps we should take to prevent this from happening again?

How was ops communication with the client?

Is there anything you would have done differently?

Was the job budgeted/sold/priced/onboarded properly?

Did we understand the client's expectations?

Was there anything we could have done to save the account?

How did we not see this coming?

On a scale from 1-10, how was the onboarding of the account?   1 2 3 4 5 6 7 8 9 10 ○ ○ ○ ○ ○ ○ ○ ○ ○ ○

Client Relationship

On a scale from 1-10 how was our overall relationship with the client?   1 2 3 4 5 6 7 8 9 10 ○ ○ ○ ○ ○ ○ ○ ○ ○ ○

How could we have improved the client relationship?

Lessons Learned/Action Items