

YOUR EXC | **YOU BROKE IT.**
NOW FIX IT LIKE YOU MEAN IT.

A TOOLKIT FOR CX TEAMS WHO DON'T MAKE EXCUSES—THEY MAKE THINGS RIGHT.

WHAT'S INSIDE THE TOOLKIT?

Service Recovery Action Plan Template

Plan your response to customer complaints, service failures, and negative feedback.

Service Failure Root Cause Analysis Template

Identify recurring issues and prevent future service breakdowns.

Service Recovery Communication Scripts

Ready-to-use scripts for apologising, empathising, and resolving customer issues.

Compensation & Gesture Guidelines Template

Standardise fair and effective gestures, discounts, or compensation.

Service Recovery Case Tracker

Log service failures, responses, outcomes, and follow-up actions.

Customer Retention Follow-Up Checklist

Ensure customers feel valued after recovery and reduce churn risk.

WHO IS THIS FOR?

- Business owners and managers committed to customer retention
- Customer service leaders and team managers
- CX consultants guiding brands through crisis management
- Hospitality, automotive, retail, SaaS, and service businesses

WHAT YOU'LL BE ABLE TO DO

- Respond to complaints with empathy and speed
- Prevent repeat service failures through structured analysis
- Equip frontline teams with clear scripts and guidelines
- Track and measure service recovery efforts
- Protect and grow customer loyalty after negative experiences

SERVICE RECOVERY ACTION PLAN TEMPLATE

1. INCIDENT DETAILS

Date of Incident:

Time of Incident:

Customer Name:

Contact Information:

Service/Product Involved:

Team Members Involved:

2. ISSUE DESCRIPTION

Brief Description of Issue:

Customer Impact Assessment:

Internal Impact Assessment:

3. IMMEDIATE RESPONSE ACTIONS

How was the customer acknowledged?

Who was informed internally?

What immediate actions were taken to mitigate the issue?

4. COMMUNICATION PLAN

Apology Message (Scripted or Customised):

Method of Communication (Call, Email, In-Person, etc.):

Responsible Team Member:

5. RESOLUTION ACTIONS

Corrective Actions Taken:

Compensation or Gesture Provided:

Timeframe for Resolution:

Customer Updated On:

6. POST-RECOVERY FOLLOW-UP

Was the customer satisfaction checked post-resolution?

Any additional follow-up required?

Feedback collected from the customer?

SERVICE RECOVERY ACTION PLAN TEMPLATE

7. ROOT CAUSE ANALYSIS & PREVENTION

What was the root cause of the issue?

What preventive actions will be implemented?

Timeline for prevention measures:

8. REVIEW & LESSONS LEARNED

Internal review held on:

Key takeaways:

Process improvements identified:

9. APPROVAL & CLOSURE

Approved by:

Date of Closure:

Case Status: Open / Closed

SERVICE FAILURE ROOT CAUSE ANALYSIS TEMPLATE

1. INCIDENT OVERVIEW

Incident Date & Time:

Reported By:

Department/Team:

Service/Product Involved:

Customer Impacted:

2. PROBLEM DESCRIPTION

Detailed Description of the Failure:

What happened?

How was the issue detected?

What was the customer impact?

3. IMMEDIATE ACTIONS TAKEN

Actions Taken to Mitigate Immediate Impact:

Customer Communication and Resolution Steps:

4. ROOT CAUSE INVESTIGATION

Investigation Team Members:

Investigation Methods Used (e.g., 5 Whys, Fishbone Diagram):

Findings from Investigation:

5. ROOT CAUSE IDENTIFIED

Primary Root Cause:

Contributing Factors:

Systems, Processes, or People Involved:

6. CORRECTIVE ACTIONS

Immediate Corrective Actions Taken:

Long-Term Corrective Actions Required:

Responsible Person(s):

Completion Deadlines:

SERVICE FAILURE ROOT CAUSE ANALYSIS TEMPLATE

7. PREVENTIVE MEASURES

Process Improvements Required:

Training or Awareness Initiatives:

System or Technology Enhancements:

Policy Updates:

8. EFFECTIVENESS REVIEW

Date of Review:

Was the corrective action effective? (Yes/No)

Additional Actions Required:

9. DOCUMENTATION & REPORTING

Case Reference Number:

Filed By:

Reviewed By:

Final Status:

SERVICE RECOVERY COMMUNICATION SCRIPTS

1. INITIAL APOLOGY (FIRST CONTACT)

"Thank you for bringing this to our attention. I'm truly sorry for the inconvenience you've experienced. This is not the standard of service we aim to provide, and I assure you we are going to address this immediately."

2. ACKNOWLEDGING THE IMPACT

"I completely understand how frustrating this must have been for you. Your experience matters to us, and I want to make sure we make this right as quickly as possible."

3. REASSURING ACTION & OWNERSHIP

"I'm personally taking ownership of this and will keep you updated on every step we take to resolve it. Your satisfaction is our priority."

4. OFFERING COMPENSATION OR GESTURE

"As a goodwill gesture, we would like to offer [compensation/discount/free service] to apologise for the inconvenience caused. We value your relationship with us and hope this reflects our commitment to you."

5. COMMUNICATING DELAYS (IF RESOLUTION TAKES TIME)

"We are actively working on resolving this issue, but it is taking longer than anticipated. I want to assure you that we have not forgotten about you, and I'll provide you with an update by [timeframe]. Thank you for your patience."

6. CLOSURE & THANK YOU

"I'm glad we were able to resolve this for you. Thank you for giving us the opportunity to fix this issue. We truly appreciate your understanding and your continued support as a valued customer."

SERVICE RECOVERY COMMUNICATION SCRIPTS

7. ESCALATION (IF FURTHER ACTION IS REQUIRED)

"I understand this situation requires further attention. I will escalate this to our [Manager/Head Office] and ensure someone gets back to you as soon as possible. We take this seriously and will not leave it unresolved."

8. WRITTEN FOLLOW-UP (EMAIL TEMPLATE)

Subject: Follow-Up on Your Recent Experience with [Company Name]

Dear [Customer Name],

I wanted to follow up personally regarding your recent experience with us. I sincerely apologise for the inconvenience caused. We take all feedback seriously and have taken steps to address the issue.

As a token of our apology, [mention any compensation if applicable]. Please feel free to reach out if you have any further concerns.

Thank you for your understanding.

Kind regards,
[Your Name]
[Your Title]
[Company Name]

COMPENSATION & GESTURE GUIDELINES TEMPLATE

1. PURPOSE OF COMPENSATION & GESTURES

THE PURPOSE OF OFFERING COMPENSATION OR GESTURES IS TO:

- Acknowledge the inconvenience caused to the customer.
- Demonstrate empathy and commitment to service excellence.
- Retain customer trust and encourage continued loyalty.

2. TYPES OF COMPENSATION & GESTURES

COMPENSATION OR GESTURES SHOULD BE PROPORTIONATE TO THE SEVERITY OF THE ISSUE. EXAMPLES INCLUDE:

- Verbal or Written Apology (minor inconvenience)
- Service Credit / Voucher (moderate inconvenience)
- Partial Refund (significant inconvenience)
- Full Refund (severe service failure)
- Free Product / Complimentary Service
- Personalised Gift or Handwritten Note
- Upgrade or Free Next Service

3. GUIDELINES FOR DECIDING COMPENSATION

WHEN DECIDING ON COMPENSATION:

- Consider the customer's level of inconvenience or loss.
- Take into account the customer's history and loyalty.
- Follow internal approval thresholds (see Section 4).
- Ensure consistency and fairness across similar cases.
- Avoid overcompensating to prevent setting unrealistic expectations.

COMPENSATION & GESTURE GUIDELINES TEMPLATE

4. APPROVAL THRESHOLDS & AUTHORITY LEVELS

DEFINE WHO HAS THE AUTHORITY TO APPROVE DIFFERENT TYPES OF COMPENSATION:

- Frontline Staff: Apology, gestures under [\$ Amount]
- Supervisor: Compensation up to [\$ Amount] or free service
- Manager/Head Office: Full refunds, high-value gestures, legal complaints

5. COMMUNICATION TIPS

WHEN OFFERING COMPENSATION:

- Be sincere and empathetic in tone.
- Clearly explain why the gesture is being offered.
- Avoid defensive language or blaming others.
- Reinforce the customer's value to the business.

6. TRACKING & DOCUMENTATION

ALL COMPENSATION AND GESTURES OFFERED SHOULD BE LOGGED IN THE SERVICE RECOVERY CASE TRACKER INCLUDING:

- Customer Name & Contact
- Nature of Service Failure
- Compensation Provided
- Follow-Up Status
- Date & Approval Signature

7. PERIODIC REVIEW & ADJUSTMENTS

REGULARLY REVIEW COMPENSATION CASES TO:

- Identify trends in service failures.
- Assess fairness and effectiveness of gestures.
- Update guidelines based on customer feedback and business performance.

SERVICE RECOVERY CASE TRACKER

CASE ID					
DATE REPORTED					
CUSTOMER NAME					
CUSTOMER CONTACT					
ISSUE DESCRIPTION					
IMPACT SEVERITY (LOW/MED/HIGH)					
INITIAL RESPONSE TAKEN					
ASSIGNED TO					
COMPENSATION/BESTURE OFFERED					
RESOLUTION PROVIDED					
CUSTOMER SATISFACTION (1-5)					
FOLLOW-UP COMPLETED (YES/NO)					
FINAL STATUS (OPEN/CLOSED)					
ROOT CAUSE IDENTIFIED					
PREVENTIVE ACTION LOGGED					
DATE CLOSED					

CUSTOMER RETENTION FOLLOW-UP CHECKLIST

1. IMMEDIATE POST-RECOVERY FOLLOW-UP

- Confirm issue resolution has been communicated to the customer
- Verify customer satisfaction with the resolution
- Offer additional support if needed (FAQ, contact details, etc.)

2. GRATITUDE & RELATIONSHIP BUILDING

- Thank the customer for their patience and for giving feedback
- Reinforce appreciation for their business
- Share any small gesture or compensation as a token of goodwill (if applicable)

3. INTERNAL HANDOVER & NOTES

- Log the case outcome in the Service Recovery Case Tracker
- Share feedback or lessons learned with the relevant team
- Document any suggested process improvements

4. ONGOING ENGAGEMENT ACTIONS

- Add customer to "High Priority" or "VIP" list if applicable
- Invite feedback via survey or personal email
- Consider offering a loyalty incentive or exclusive offer

5. FOLLOW-UP TOUCHPOINT (OPTIONAL BUT RECOMMENDED)

- Follow up after 2-4 weeks to check customer satisfaction
- Offer a complimentary check-in, product update, or special service
- Thank them again and invite referrals or reviews if appropriate

6. FINAL REVIEW & CLOSURE

- Ensure all case notes are complete
- Verify if preventive actions were implemented (if relevant)
- Mark case as closed with final customer sentiment recorded

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**FIX THE EXPERIENCE.
GROW THE REVENUE.**

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