

# Professionalism Quiz for Investigators and Process Servers

What's the Achilles' heel of your company? Every business has one, and now is the time to take action to prevent it from dragging your company down. Discover your business' strengths and weaknesses by completing this company evaluation. Check the boxes on questions below when they are absolutely true. Answering questions honestly will help you to see where you can improve. Add your point totals from each section together. At the end of the quiz, your point totals will show you where your strengths and weaknesses lie. These are a handful of business practices that we deem to be important in professional businesses; however, there are many more. It is important to revisit this quiz at least every three months to gauge your company's progress.

## 1. Telephone Basics

- Have a trusted friend or colleague call your business. Find out how quickly the phone was answered, if your staff was upbeat and pleasant, and how professionally your staff treated the caller. If your staff is meeting or exceeding your expectations give yourself 2 points. (2 points)
- Is your phone *always* answered by a live voice during business hours? (1 point)
- Do you have roll over phone lines, or is someone answering your phone while you are away from the office, and after business hours? (2 points)
- Does your business have a toll-free number? (1 point)

\_\_\_\_\_ **Total Points out of 6**

## 2. Customer Service Basics

- Have you had problems with customers that you wish you would handled differently? (2 points)
- When mistakes occur, do you find quick and efficient ways to deal with them while ensuring that they will not occur again? (2 points)
- After a mistake occurs, do you offer something in return to console the client (discounting a service, offering a free serve, etc.)? (2 points)
- Has the same mistake occurred more than once? (Take away 2 points.)
- Are you constantly looking for better and more efficient ways to communicate with and take care of your clients? (2 points)
- Have you given your clients a customer satisfaction survey to be sure you are meeting their needs? (1 point)

\_\_\_\_\_ **Total Points out of 7**

## 3. Branding

- Is your company's branding (colors, logo, company name, etc.) used consistently on your website, business cards, envelopes, affidavits, reports and other materials? (2 points)
- Do you and your employees bring business cards with you when you go to parties or while on vacation? (1 point)
- Are you and your employees dressing the same if not better than your legal customers? (1 point)
- Are the emails sent from your employees written clearly, concisely and without grammatical errors? (2 points)
- Do you have professionally created marketing materials? (1 point)

\_\_\_\_\_ **Total Points out of 7**

## 4. Sales/Marketing

- After you have completed the job, and the customer is happy, do you upsell your additional services? (If you're a process server, do you upsell document retrieval and court filing services?) (2 points)
- After you have completed the job, and the customer is happy, do you ask for referrals? (2 points)
- When asking for a referral, do you ask for the person's contact information as well as an introduction? (1 point)
- Do you spend more than five hours a week looking for ways to generate more business? (2 points)
- Are you asking your clients how they are finding you, and tracking this information? (1 point)
- Are you taking the information (from the above question) and putting more marketing dollars into the advertising that's yielding the best results? (1 point)

- Are you advertising your business in both traditional and online advertising resources? (2 points)

\_\_\_\_\_ **Total Points out of 11**

## 5. Technology

- Does your company have a website? (2 points)
- Do you and your employees' email addresses include your domain name in them? (Example: [jan@bobsprocessservice.com](mailto:jan@bobsprocessservice.com)) (1 point)
- Do you accept documents electronically? (1 points)
- Can your customers log in and get online status updates? (2 points)
- Do you receive emails on your cell phone? (2 points)
- Do you reply to all emails within 15 minutes of receiving them? (1 point)

\_\_\_\_\_ **Total Points out of 9**

\_\_\_\_\_ **Total Points out of 40**

## Results:

### 1-15 Points

The questions that are not checked should serve as starting points to improve your business' professionalism. These changes can increase your company's value in the eyes of your customers and employees. By paying close attention to the importance of having strong customer service, consistent branding, strong sales and marketing, and well-built technology you can watch your company grow.

### 15-30 Points

While your business is on its way to being an incredibly professional organization, there is room for improvement. Determine where you are missing the most checkmarks to identify your company's weaknesses. By recognizing and addressing them, you can turn them into your business' strengths.

### 30-40 Points

Making small changes to your business practices will help your company retain a solid reputation within the process serving industry. A few subtle changes to your already strong business practices can help your business' growth and client retention. Being the best requires you to continuously look for ways to improve.

For additional questions on how to improve your business' professionalism, please contact [ServeNow.com](http://ServeNow.com) at (877) 737-8366 or [info@serve-now.com](mailto:info@serve-now.com).



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