



SARAH LEWIS & CO

PRACTICAL SUPPORT FOR SMALL BUSINESSES

Customer Contact Audit Checklist

A quick small business check to make sure customers can reach you easily, and get a reply when they do.

1 Your website

IS IT EASY FOR CUSTOMERS TO GET IN TOUCH?

- ☐ Have you tested your contact form?
- ☐ Is your contact information (email, phone, address) clearly visible on the home page?
- ☐ Does the form give a clear confirmation message (e.g. "Thanks, we've received your message")?
- ☐ Are there any broken links or errors?
- ☐ Is your privacy policy and/or data notice up to date?

2 Email, phone and social media

ARE ALL YOUR CONTACT CHANNELS WORKING?

- ☐ Does your business email inbox work and get checked regularly?
- ☐ Is your phone number correct and answered (or does it go to voicemail with a helpful message)?
- ☐ Are your contact details correct on social media channels (e.g. Instagram, Facebook, LinkedIn)?
- ☐ Are social media messages being monitored?
- ☐ Do you have an auto-reply or away message set up when needed (e.g. out of office)?

3 Who is responsible?

IS IT CLEAR WHO HANDLES CUSTOMER ENQUIRIES?

- ☐ Is there a named person (or team) responsible for customer enquiries?
- ☐ Does everyone know which channels they monitor?
- ☐ Is there cover in place during holidays or busy periods?
- ☐ Are handovers clear if someone is away?

4 Response times

ARE YOU REPLYING PROMPTLY?

- ☐ Do customers get a reply within one working day?
- ☐ Do you have a target response time (and is it realistic)?
- ☐ Are you meeting your response time consistently?
- ☐ Do you let customers know if there will be a delay?

5 Be your own customer

PUT YOURSELF IN THEIR SHOES.

- ☐ Try getting in touch via each channel (website form, email, phone, social media).
- ☐ Was it easy to find the right information?
- ☐ Did you receive a reply? If so, how long did it take?
- ☐ Was the response friendly, helpful and clear?
- ☐ Is there anything that could make the experience smoother?

Quick review

TAKE A MOMENT TO REFLECT – AND PLAN YOUR NEXT STEPS.

What is working well?

What needs fixing first?

Who owns the action?