



## **SOP: Front Desk Customer Check-In Survey**

**Effective Date:** 11/09/2023 | **Written By:** Regan Goins

**Purpose:** CAC is partnering with Human Animal Support Services (HASS) to collect data on customer foot traffic. The purpose of collecting data on foot traffic and client feedback visits allows CAC to identify why people are coming to the shelter, the busiest times, and if the person did not leave with a pet, why that happened. This data informs marketing efforts, staffing levels, and community needs, and helps to identify strategies to increase adoption outcomes.

**Tools:** tablet, charger, QR code flier, computer

### **Documents:**

- [Customer Check-in Survey: Dane](#)
- [Customer Check- in Queue: Dane](#)
- [Customer Check-in Survey: Colerain](#)
- [Customer Check-in Queue: Colerain](#)

### **Step-By-Step:**

#### **1. Greeting Guests**

- a. To ensure a warm welcome and efficient assistance for every visitor, it is mandatory to greet each person **before their feet leave the doormat.**
- b. Your greeting should include
  - i. A salutation. Ex: "Hi there!"
  - ii. Gratitude for coming to the shelter. Ex: "Thanks so much for coming in today."
  - iii. Triage why they are visiting. Ex: "How can we help you today?"
  - iv. If the customer has the opportunity to leave with an animal today (RTO, Adoption, Foster) then:
    1. Direction to sign in either using the tablet or the QR codes at the entrance ([Customer Check-in Survey: Dane](#), [Customer Check-in Survey: Colerain](#), QR codes should be in inventory). Ex: "Please sign in on the tablet/using the QR code there."
      - a. **At Dane: all customers must sign in EXCEPT for Community Support needs.** Community Support tracks their own foot traffic. Please just direct these customers around back and let them know that Community Support will be back there to assist them.
  - v. If the customer is here to locate their lost dog, please see the RTO protocol.
  - vi. If the customer is here for medical reasons (appointment, picking up meds, pick up/drop off for surgery) then, please direct them to the clinic and call to

- alert medical.
- vii. Assurance of fast service. Ex: "We'll be right with you if you want to take a seat after you sign in."
- viii. Full example: "Hey there! Thank you so much for coming in today. If I could have you sign in on that tablet there, we'll be right with you."

## 2. Using the Queue Spreadsheet

- a. The sign in form should auto populate into the queue sheet ([Customer Check- in Queue: Dane](#), [Customer Check-in Queue: Colerain](#))
- b. Specialists should use the queue to triage who can be redirected to another location, who needs help at the desk, and who is in line next.
  - i. Ex: a customer is here to surrender a dog and shows up as 6th in line. The specialist can call out that person's name and direct them to the correct location before continuing on with their current customer.
  - ii. In general, the specialist will call the next in line person up to their desk to help. **Each time a new name is called or the specialist touches base with the next customer, the specialist will click the box in column K in the row corresponding with the customer's name to indicate that they have touched base/served that person.**
  - iii. If the customer comes back to the front desk and was originally interested in fostering or adopting an animal, specialists will fill in columns M-P on their queue spreadsheet.

## 3. Customer Experience Survey

- a. In order to capture data that will help us improve our customer service, a [Customer Experience Survey](#) will be sent out at the end of each day.
  - i. Email surveys will be sent out using the front desk Google Voice account using this template. If Google Voice is unavailable, it will be sent via email from the front.desk@ email address.

### Email Template:

Thank you for your recent visit to the Cincinnati Animal CARE Shelter & Resource Center!

We invite you to take part in the following **survey to share your experience** during your most recent visit to the shelter:

### [Customer Experience Survey](#)

Your feedback is instrumental in helping us make improvements and ensure we're **meeting the needs of pets and people in our community**. The survey is designed to be quick and easy, taking just a few minutes of your time. We truly appreciate your time and participation.

- ii. To send an email survey:
  1. Compose a new message and copy and paste the above template into the body of the email.
  2. Use the appropriate queue spreadsheet ([Customer Check- in Queue: Dane](#), [Customer Check-in Queue: Colerain](#)) to copy all of the emails customers provided that day.
  3. Paste those email addresses into the "BCC" line of the email.
  4. Enter [front.desk@cincycare.org](mailto:front.desk@cincycare.org) into the "to" line of the email.

5. Enter "Your Feedback Matters - Cincinnati Animal Care Visit" in the title line of the email.
  6. Send the email.
- iii. To send a text survey:
1. Go to the Google Voice app for front.desk@.
  2. On the left hand side, click on messages. Click "Send a New Message"
  3. Text messages must be sent one at a time, not in a group manner.
  4. Use the appropriate queue spreadsheet ([Customer Check- in Queue: Dane](#), [Customer Check-in Queue: Colerain](#)) to copy the phone numbers of customers one at a time.
  5. Copy and paste one phone number into the "To" section of the new message on Google Voice.
  6. Copy and paste the following template into the body of the message:

Thank you for your recent visit to the Cincinnati Animal CARE Shelter & Resource Center! We invite you to take part in the following survey to share your experience during your most recent visit to the shelter:

<https://forms.gle/dpJp3ArXwXiaGLjQ8>

Your feedback is instrumental in helping us make improvements and ensure we're meeting the needs of pets and people in our community. The survey is designed to be quick and easy, taking just a few minutes of your time. We truly appreciate your time and participation.

7. Send the message.
8. Repeat until all phone numbers have been sent a customer experience survey.