

SLA Optimization Worksheet

Assess & Improve to Optimize
Customer Satisfaction

March 2025

SLA Optimization

Use this worksheet to assess your current systems and processes related to Service Level Agreements (SLAs) and customer satisfaction. Answer the questions and complete the action items to create a roadmap for improvement.

Current State Assessment

Evaluate your existing systems and practices.

1

Inventory Management:

How do you currently track inventory levels?
(e.g., Manual counts, Basic inventory system, Real-time tracking)

2

Order Fulfillment:

What is your average order fulfillment time?

3

System Integration:

How well do your systems integrate with each other?
(e.g., Not integrated, Some integration, Fully integrated)

4

Customer Feedback:

How do you gather and analyze customer feedback?

Identify Gaps

Reflect on the areas where your systems may be lacking.

Visibility:

How often do you have real-time visibility into your operations?

Scalability:

What challenges do you face when trying to scale your operations?

SLA Monitoring:

How do you currently monitor and review your SLAs?

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Action Items

Based on your assessment, outline specific actions to improve your SLA performance.

Immediate Actions (1-3 months)

Short-Term Goals (3-6 months)

Long-Term Strategies (6+ months)

Measuring Success

Define key performance indicators (KPIs) to track your progress.

1

SLA Metrics:

What metrics will you use to measure SLA performance?

2

Customer Satisfaction Metrics:

How will you gauge customer satisfaction and feedback?

3

Integration and Visibility Metrics:

What indicators will you track for system integration and visibility?

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Next Steps

Based on your assessment, outline specific actions to improve your SLA performance.



Schedule a Meeting:

Set up a time to discuss your findings and action plan with your team.

Participants:

_____	_____
_____	_____
_____	_____
_____	_____

Research Solutions:

Identify technologies or solutions that can help address your gaps.

_____	_____
_____	_____
_____	_____



Follow-Up:

Plan a follow-up meeting to review progress on your action items.

Participants:

_____	_____
_____	_____
_____	_____
_____	_____

This SLA Optimization Worksheet is designed to help you systematically assess and improve your processes. By following the steps outlined, you can create a roadmap that enhances your SLAs and boosts customer satisfaction.