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The Baldrige framework empowers your organization to reach its goals, improve results, and become more competitive. The framework consists of the Criteria, the core values and concepts, and the scoring guidelines.

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You can use this booklet as a reference, for self-assessment, or as the basis of an external assessment.

1 Criteria for Performance Excellence Overview and Structure

The Criteria include the Organizational Profile and seven interconnected categories.

3 Criteria for Performance Excellence

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Performance against Criteria items is scored on two evaluation dimensions: process and results.

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This section explains how to respond most effectively to the Criteria item questions.

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These embedded beliefs and behaviors form the foundation of the Criteria.

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The glossary includes definitions of terms in SMALL CAPS in the Criteria and scoring guidelines.

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Criteria Commentary

For each Criteria item, this commentary provides an in-depth explanation and additional examples to build users' understanding.

3.2 Customer Engagement: How do you build relationships and enhance the customer experience?

a. CUSTOMER Experience

- (1) **Relationship Management** HOW do you acquire and retain CUSTOMERS by building and managing relationships? How do you
 - build a more CUSTOMER-focused organizational CULTURE,
 - manage and enhance your brand, and
 - meet CUSTOMERS' requirements and exceed their expectations in each stage of the CUSTOMER life cycle?
- (2) **CUSTOMER Access and Support** HOW do you enable CUSTOMERS to do business with you, seek information, and obtain support? How do your PROCESSES or mechanisms vary for different CUSTOMERS, CUSTOMER groups, or market SEGMENTS, as appropriate? How do you
 - determine your CUSTOMERS' KEY support requirements and expectations, and
 - DEPLOY these requirements to all people and PROCESSES involved in CUSTOMER support?
- (3) **Complaint Management** HOW do you manage CUSTOMER complaints? How do you resolve complaints promptly and EFFECTIVELY and recover your CUSTOMERS' confidence? How do you analyze complaints and use this information to make the necessary changes to prevent future complaints?
- (4) **Fair Treatment** HOW do your CUSTOMER experience PROCESSES promote and ensure fair treatment for different CUSTOMERS, CUSTOMER groups, and market SEGMENTS?

b. Determination of CUSTOMER Satisfaction, Dissatisfaction, and ENGAGEMENT

Satisfaction, Dissatisfaction, and ENGAGEMENT HOW do you determine CUSTOMER satisfaction, dissatisfaction, and ENGAGEMENT? How do your determination methods differ among your CUSTOMER groups and market SEGMENTS, as appropriate? How do you take action on the RESULTS of satisfaction, dissatisfaction, and engagement determination methods? How do you obtain information on CUSTOMERS' satisfaction with your organization relative to competitors and other organizations providing similar products and/or services?

Terms in SMALL CAPS are defined in the Glossary of Key Terms (pages 44–51).

Notes

3.2. Results for customer perceptions and actions (outcomes) should be reported in item 7.2.

3.2a. You should ensure that your approaches for managing customer relationships, enabling customers to seek information and support, and managing complaints promote fairness, equity, and inclusion and do not inadvertently discriminate.

3.2b. Determining customer dissatisfaction should be seen as more than reviewing low customer satisfaction scores. It should be independently determined to identify root causes and enable a systematic remedy to avoid future dissatisfaction.

3.2b. Information on relative satisfaction with other organizations may include comparisons with competitors, comparisons with organizations that deliver similar products and/or services in a noncompetitive marketplace, or comparisons with industry benchmarks obtained through trade or other organizations. Such information may also include information on why customers choose your competitors over you.

For additional guidance on this item, see the [Criteria Commentary](#).