



The Definitive Planning Guide for Improving the Customer Experience You Deliver

Contact center executives are always tasked with improving the customer experience they deliver with little additional resources in either money or staff. So where do you start to ensure that you get the most return on your investment? It all begins with planning. Your contact center strategy must have a clear set of priorities that aligns with your customer experience vision statement and guiding principles.

The customer experience vision statement provides the foundation for your contact center agents and the rest of the business to follow. Creating a priority initiative plan that aligns with your customer experience vision leads to a roadmap that ensures people and customer service processes are intertwined so you can achieve your customer experience objectives.

This self-paced exercise will help you develop a priority plan that gets you started on improving the customer experience you deliver regardless of the size, shape or function of your contact center.

1. Define Your Customer Experience Vision Statement

A. In three sentences, describe the ideal experience customers have when they interact with your contact center

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B. What are your contact center's top five guiding principles and values agents must model when servicing customers?

C. Articulate your contact center customer experience vision statement in two or three sentences.

D. What teams, departments or lines of businesses are key to helping you achieve this vision?

E. Do the teams listed above understand their role in helping you achieve your customer experience vision?

F. What is the single ultimate outcome you hope to realize from effectively supporting your customers?

2. Define Existing Successes and Improvement Opportunities

- A. What Key Performance Indicators (KPIs) and metrics do you currently track in your contact center. Name 5-10.

 - B. What metrics are you consistently successful at achieving?

 - C. Which metrics are you most often struggling to meet?

 - D. Are there other metrics you wish you were tracking or believe would be beneficial to track? List 3-5.

 - E. How do you identify your top and bottom performing agents? Name three ways.

 - F. What actions do you take with top performers to ensure continued success?

 - G. What actions do you take with low performers to make improvements?

 - H. What three things can you begin doing immediately to maintain your top performers and bring up your low performers to meet the standards set forth in your customer experience vision statement?

 - I. What resources will you need to achieve the above?
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3. Define Your Contact Center's Biggest Challenges

- A. List the top five challenges your contact center needs to overcome to fully deliver on your customer experience vision.

 - B. List the tools and skills needed to overcome each challenge named above.

 - C. Does your contact center have the necessary tools and skills to meet each challenge? Note the missing tools and/or skill gaps that need to be filled.

 - D. How are these challenges the same and different from your top three competitors?

 - E. Assess your ability to overcome these challenges relative to your competition.

 - F. What one step can you take in the direction of overcoming your biggest of the top five challenges?

 - G. What tools and resources will you need to do so?
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4. Chart Your Contact Center's Success Today and into the Future

- A. What are the top three things you need to accomplish now to improve your contact center?

 - B. How about the overall customer experience you deliver?

 - C. What initiatives are currently underway to support the top three things you need to do as described 4a? 4b?

 - D. What new capabilities will you need in three years? Why?

 - E. How will having these new capabilities lead to big improvements for your customer experience in the long term?

 - F. What resources will you need to procure to add these capabilities to your team?

 - G. Are there any other requirements to further improve performance such as competitive positioning and cost reductions?
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5. Zero in on Your Strategy and Communicate to Key Stakeholders

- A. In a single sentence, state your customer experience strategy based on the work you've done above.
- B. Why is this single sentence so crucial to the success of the contact center? To the organization?
- C. Who are the key stakeholder groups you need to help you achieve your customer experience vision? List 2-4.
- D. What are three ways you can involve these stakeholders in the finalization of the strategy to enhance buyin?
- E. For each stakeholder group, list three examples of behaviors that support your customer experience strategy you would like to see emulated by others in the organization.
- F. What customer experience outcomes will these behaviors drive? List three.
- G. What overall business outcomes may result from these behaviors?
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1. Note the Milestones and Highlight Key Achievements

- A. What changes should your agents be making and seeing in the first 30 days of launching your customer experience vision and strategy?

 - B. Describe the experience your customers will be receiving after 30 days.

 - C. What other changes should agents be making and seeing in the first 90 days?

 - D. What will customers be experiencing after 90 days?

 - E. In six months, what are the top three things you expect to change the most?

 - F. Describe the top three changes you expect to see after one year.

 - G. How can you get the word out internally about success along the way? Name three ways.
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There you have it. A step-by-step process to help you create a strategy and roadmap to increase your customer experience and your contact center's effectiveness and internal return-on-investment. Following these steps in your planning process can help transform your contact center into a critical strategic weapon for your organization.



Learn More

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