

CUSTOMER SERVICE STRATEGY WORKSHEET

A customer service strategy is an organization's blueprint to provide customers with excellent and sufficient support—from pre-purchase to after-sales. Use this worksheet to guide your decision-making process from the initial planning stages, purchase of a new customer service tool, and metrics to measure your servicing quality.

Step 1: Identify Your Customer Service Goals, Objectives & Action Plans

List out what you want to achieve through your customer service strategy. Remember to identify SMART (specific, measurable, achievable, relevant, and time-bound) goals.

	Goals & Objectives	Corresponding Action Plan
1		
2		
3		
4		
5		

Step 2: Identify Your Customer Service Team

Step 1: Determine the required manpower vis-a-vis the volume of customer queries you usually receive by answering these questions:

- Which employees have the potential and bandwidth to be included in the customer service team?
- How many customer queries do you usually receive on a monthly basis?
- What is the average number of tickets that each agent can efficiently accommodate per week or month?

Step 2: List down your existing and potential customer service team members, as well as their responsibilities and technical know-how:

	Goals & Objectives	Corresponding Action Plan	Responsibilities & Technical Know-how
1			
2			
3			
4			
5			

Step 3: Identify Your Customer Service Touchpoints & Select Your Customer Service Software

Check the potential customer service touchpoints you want to use as this will guide you in choosing the right customer service tool. Options are listed below from the easiest to hardest to maintain:

- Help desk and ticketing tool
- Email/ shared inboxes
- Live chat
- Chatbot
- In-app phone

Note: Another option is to utilize the communication touchpoints in your CRM software if you currently use one.

After identifying your customer service team members and touchpoints, list at least three customer service software tools that best match your needs. One of the most important considerations is price, so factor in that consideration as well.

	Software	Touchpoints Offered	Price
1			
2			
3			

Step 4: Identify Customer Service Information Sources You Want to Create

Below are examples of customer service information you can include on your website. Determine the existing information resources that you have or need to create.

FAQ/ Knowledge Base

_____ (ex. product specs, return policy)

Instructional Videos

_____ (ex. B-rolls, visuals)

Webinars

_____ (ex. subject matter expert)

Others

Step 5: Identify Metrics to Measure Your Customer Service Quality

Identify a specific time period to review the overall quality of your servicing activities. This way, you'll be able to keep track of your customers' sentiments toward your servicing, as well as identify areas for improvement. Below are potential metrics you can use:

- Customer service satisfaction score
- Net promoter score
- Support and call abandonment rate
- Social media sentiments
- Resolution rate
- Resolution duration rate
- Percentage of customer churn
- Percentage of customer retention