Table of Contents

Beginnings 3
Before the Workshop 4
Exercise: Strategic Planning Assessment 5
The Strategic Planning Process 9

Module 1: Strategic Planning in Today's Environment 10
Vision, Mission, Values 11
Three Levels of Value 14
SWOT Analysis—Example (Tech Company) 20
Strategic Alignment Model 21
Customer Access Strategy 22

Module 2: Turning Strategy into Reality 39
Exercise: Action Planning Tool 41

Module 3: Innovation in a New Era 56

Appendix 57
Sample Customer Access Strategy 59

Welcome to Your ICMI Training Course!

At ICMI, our mission is to make contact centers and contact center professionals better every day. With each step you take during this training, you're on your way towards improving every interaction with your customers, your peers, and the stakeholders in your organization. So whether you're brand new to contact centers, an industry veteran, or somewhere in between, you will gain something valuable from this course.

This class is your place to connect and learn from those who are as passionate about their profession as you are. Consider ICMI your go-to resource offering fresh perspectives, answers to your questions, and galvanizing new ideas in a welcoming, collaborative environment.

How to use this workbook: ICMI Certified Associates are industry leaders who bring a wealth of experience and knowledge to the classroom. The content of this workbook aligns with the content your instructor will present.

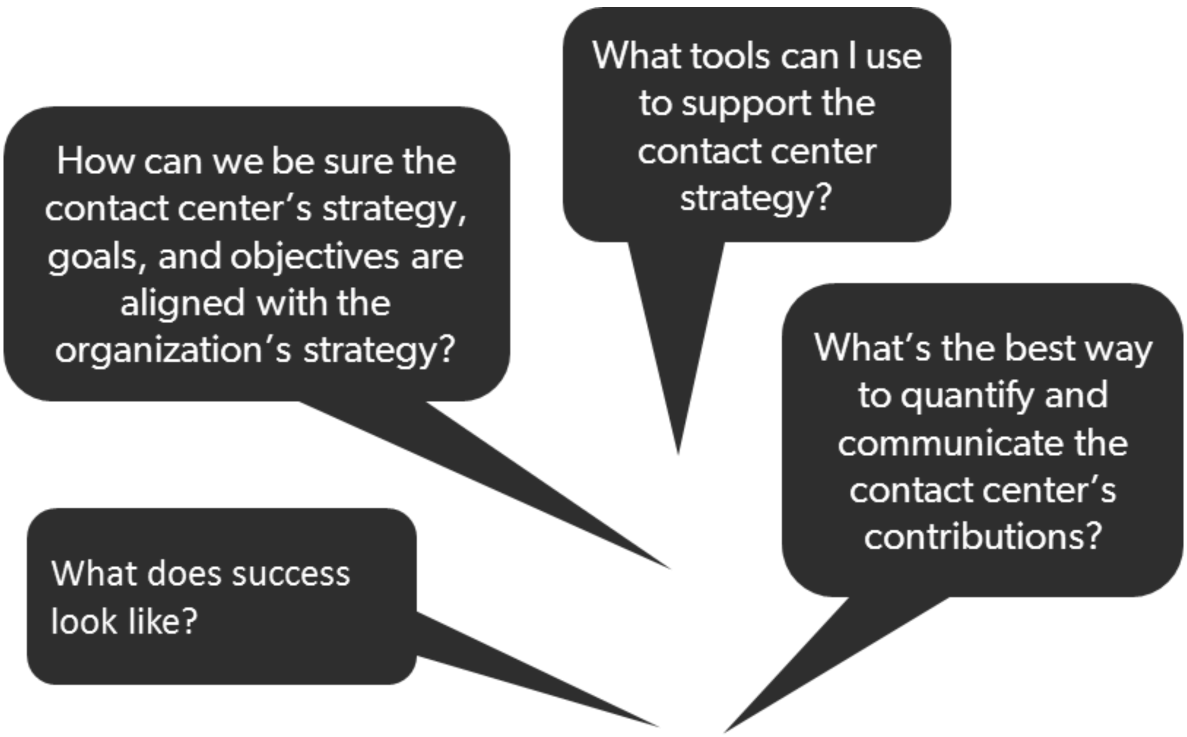
There's room to take additional notes, fill in information presented, and complete exercises. It's meant to provide a framework while not restricting you. Just the act of writing a keyword, phrase, or sentence, or sketch out a concept, can help you learn and remember better. Customize it to create a record of the training to reference after the class is over. Make it your own.

If there's anything we can do to advance your professional development, just let us know. ICMI is here to support you, as you are the people others look to for support. We know that you care about your customers, and we care about you.

Warm Regards,
The ICMI Team

Beginnings

Have you ever asked…?



Before the Workshop

[ ] Customer Service Strategy (LinkedIn Learning)

[ ] Strategic Planning Assessment (spreadsheet)

[ ] *Leading the Customer Experience*, Chapter 4

[ ] Questions related to brand promises and customer experience

Exercise: Strategic Planning Assessment

The purpose of this assessment is to provide you with a starting point to use in the process of creating, validating, or improving your current contact center strategic planning process. The statements below are aligned with the workshop content and will allow you to assess your contact center's strategic planning processes to identify both strengths and areas of opportunity. The results will enable you to identify where you would need/want to focus your efforts during the workshop and beyond.

(See associated Excel file for automated scoring)

Directions:

1. Review each statement and rate the extent to which you **agree** or **disagree** with each using the rating scale below.

   1 = Strongly Disagree
   2= Disagree
   3= Not Sure
   4 = Agree
   5 = Strongly Agree

2. Place the number that corresponds to your response in the box next to the statement. Once you have responded to each statement, calculate the totals where indicated.
3. **Then turn to the next page for instructions on how to interpret your ratings.**

Strategic Planning Assessment Statements	Rating
1. A strategic framework exists, which connects vision with strategy, strategy with tactics, and strategic partners with customers.	

Strategic Planning Assessment Statements	**Rating**
2. Your customer access strategy is well-developed and integrated into the contact center's strategic planning process.	
3. The contact center's internal and external interdependencies are understood throughout the organization and this knowledge is leveraged to break down service delivery barriers, respond flexibly to outside forces, and improve service performance.	
Total for statements 1-3:	
4. A contact center action plan exists which ensures initiatives and investments align with the contact center's strategic objectives and the organization's mission.	
5. The contact center workforce is organized and equipped with the right structure, skills, development, tools, resources, and supporting processes to meet current and future objectives.	
6. A vision for the strategic use of technology has been developed. This vision aligns business objectives, processes, and customer requirements to enhance service delivery and achieve efficiencies and return on investment.	
Total for statements 4-6:	
7. The contact center's strategic value has been quantified and communicated throughout the organization. Performance improvement is driven through thoughtful measurement and analysis.	
8. There is a framework of measurements and KPIs for individuals, teams, and the contact center that accurately reflect customer, employee, and company priorities.	
Total for statements 7-8:	
9. Contact center budget drivers have been identified and are utilized to explain the relationship between contact center budget, staffing, capacity and customer accessibility to stakeholders outside the contact center.	
Total for statement 9:	

Strategic Planning Assessment Statements	**Rating**
10. Customers, employees, and strategic partners are engaged in developing goals, executing plans, and delivering results.	
11. The essentials of delivering positive customer experiences have been defined and communicated to contact center employees and strategic partners.	
12. Processes to capture, analyze, and leverage customer perspectives exist and are utilized throughout the organization.	
Total for statements 10-12:	

Please go to the next page for interpretation of your assessment.

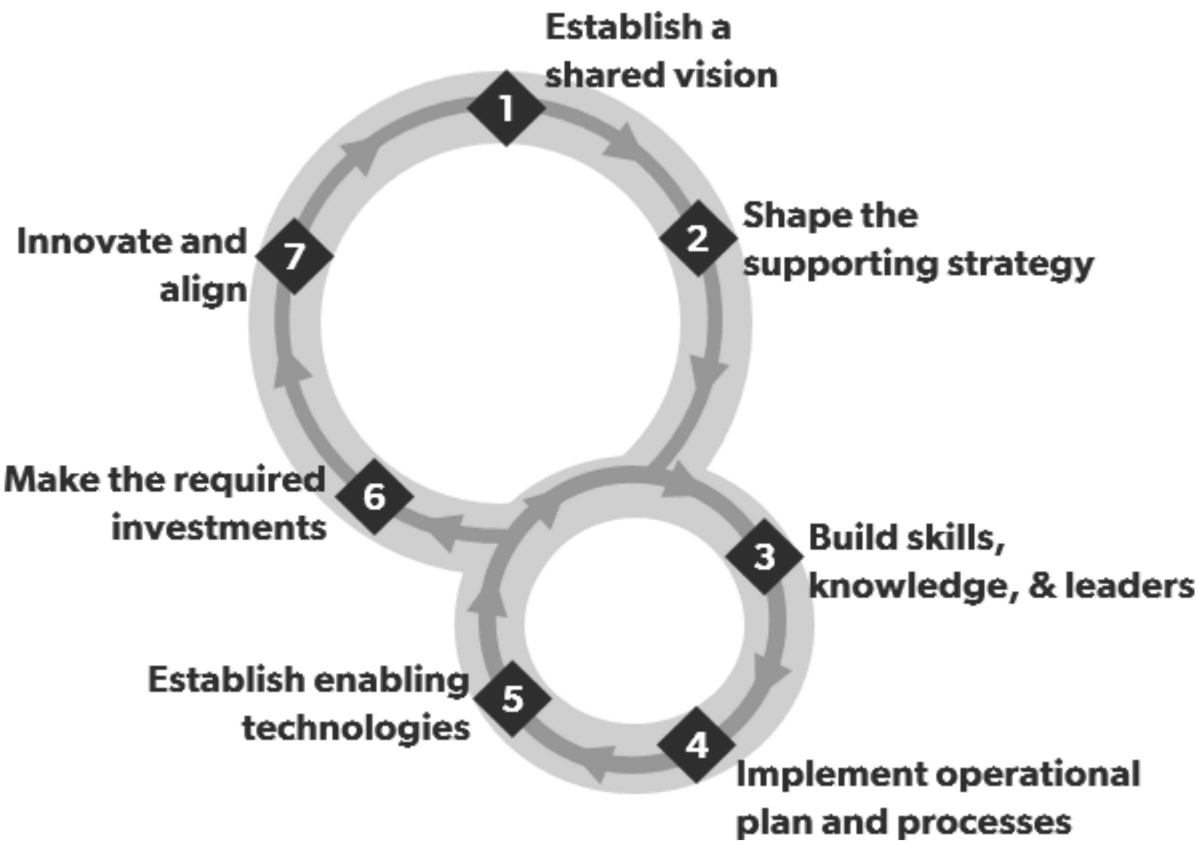
Interpreting Your Results

The totals are also color coded to assist you in identifying key areas of strength and key areas of opportunity for you and/or your contact center(s).

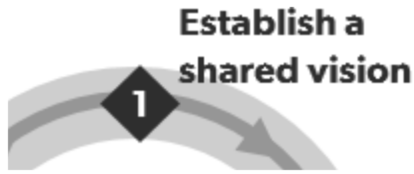
GREEN = Area of strength
YELLOW = Opportunities exist to improve and/or strengthen
ORANGE = Some areas either don't exist or need significant attention

Circle YOUR totals for each set of statements	GREEN	YELLOW	ORANGE
Strategic Planning & Management Total for statements 1-3:	12-15	7-11	3-6
Aligning Contact Center Operations with Strategy Total for statements 4-6:	12-15	7-11	3-6
Key Performance Indicators Total for statements 7-8:	8-10	5-7	3-6
Financial & Resource Management Total for statement 9:	5	3-4	1-2
Customer, Employee, & Strategic Partner Engagement Total for statements 10-12:	12-15	7-11	3-6

The Strategic Planning Process



Module 1: Strategic Planning in Today's Environment



Vision, Mission, Values

One day Alice came to a fork in the road and saw a Cheshire Cat in a tree.

"Which road do I take?" she asked.

His response was a question: "Where do you want to go?"

"I don't know," Alice answered.

"Then," said the Cat, "it doesn't matter."

From *Alice's Adventures in Wonderland* by Lewis Carroll

Examples

Warby Parker mission

"We believe that buying glasses should be easy and fun. It should leave you happy and good-looking, with money in your pocket."

USAA core values

"service, Loyalty, Honesty, Integrity."

REI core purpose

"We inspire, educate and outfit for a lifetime of outdoor adventure and stewardship."

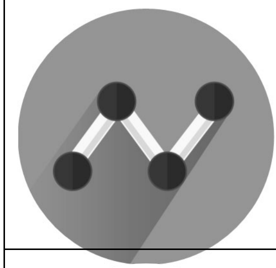
Services Australia vision

"Make government services simple so people can get on with their lives."

A Contact Center is…

… a coordinated system of **people, processes, technologies and strategies** that provides access to **information, resources, and expertise** through appropriate channels of communication enabling interactions that **create value for the customer and organization**.

Three Levels of Value

	**Level 3: ______________________________** Gathering, analyzing, and sharing customer feedback to drive overall organizational improvements
	**Level 2: ______________________________** Providing distinguished service that improves customer retention and transforms customers into advocates
	**Level 1: ______________________________** Fulfilling the mission of the center in the most cost-effective manner

Exercise: Three Levels of Value

Instructions: Evaluate your contact center(s) on the three levels of value using this rating scale:

Column 1: Current *contribution* scale:

1 = We are not delivering on this level at all

5 = We are completely delivering on this level

Column 2: Current *communication* scale:

1 = Has not been communicated at all

5 = Has been very well communicated and is understood

Column 3: Describe any actions necessary to either sustain current rating or improve rating.

After you complete the table, you will discuss your individual ratings with your group and answer the questions below the table.

Level of Value	Column 1 Current contribution 1-5	Column 2 Current communication 1-5	Column 3 Actions necessary to sustain/ improve ratings
Level 1: Efficiency Because contact centers pool information, people and technology resources, they are a highly efficient means of delivering service. Appropriate forecasts, accurate staffing and schedules, and effective real-time management complement and further the center's inherent efficiencies. And these disciplines retain their importance, even as an ever-expanding array of contact channels become part of the mix.			

Level of Value	Column 1 Current contribution 1-5	Column 2 Current communication 1-5	Column 3 Actions necessary to sustain/ improve ratings
Level 2: Customer Satisfaction and Loyalty In recent years, research has begun to reveal the powerful connection between high levels of satisfaction and profitability. And given today's powerful social communities and the opportunity for customers to share experiences, every interaction must be viewed as an event that can have an impact, positive or negative, on the organization's brand reputation.			

Level of Value	Column 1 Current contribution 1-5	Column 2 Current communication 1-5	Column 3 Actions necessary to sustain/ improve ratings
Level 3: Strategic Value The contact center is the customer's moment of truth, shaping how they perceive and will interact with the organization in the future. But there's far more to it—in the course of handling interactions and capturing customer input, the contact center can become a powerful source of intelligence (based on customer data and insight), helping business units across the board improve products, services and processes.			

Q1: What are the barriers to driving value in all three areas? Is it possible to effectively deliver on one level and not another?

Q2: How may the table change in the next 12-18 months?

Q3: What are some clues to the contact center's perceived value to the organization? (List as many you can)

2 Shape the supporting strategy

SWOT Analysis—Example (Tech Company)

Strengths: What is our industry and competitive advantage?

Employee knowledge & skills
Systems and knowledge bases
Company culture and brand

Weaknesses: Where are we weak, compared to our competitors?

Complex product line
Lack of physical locations

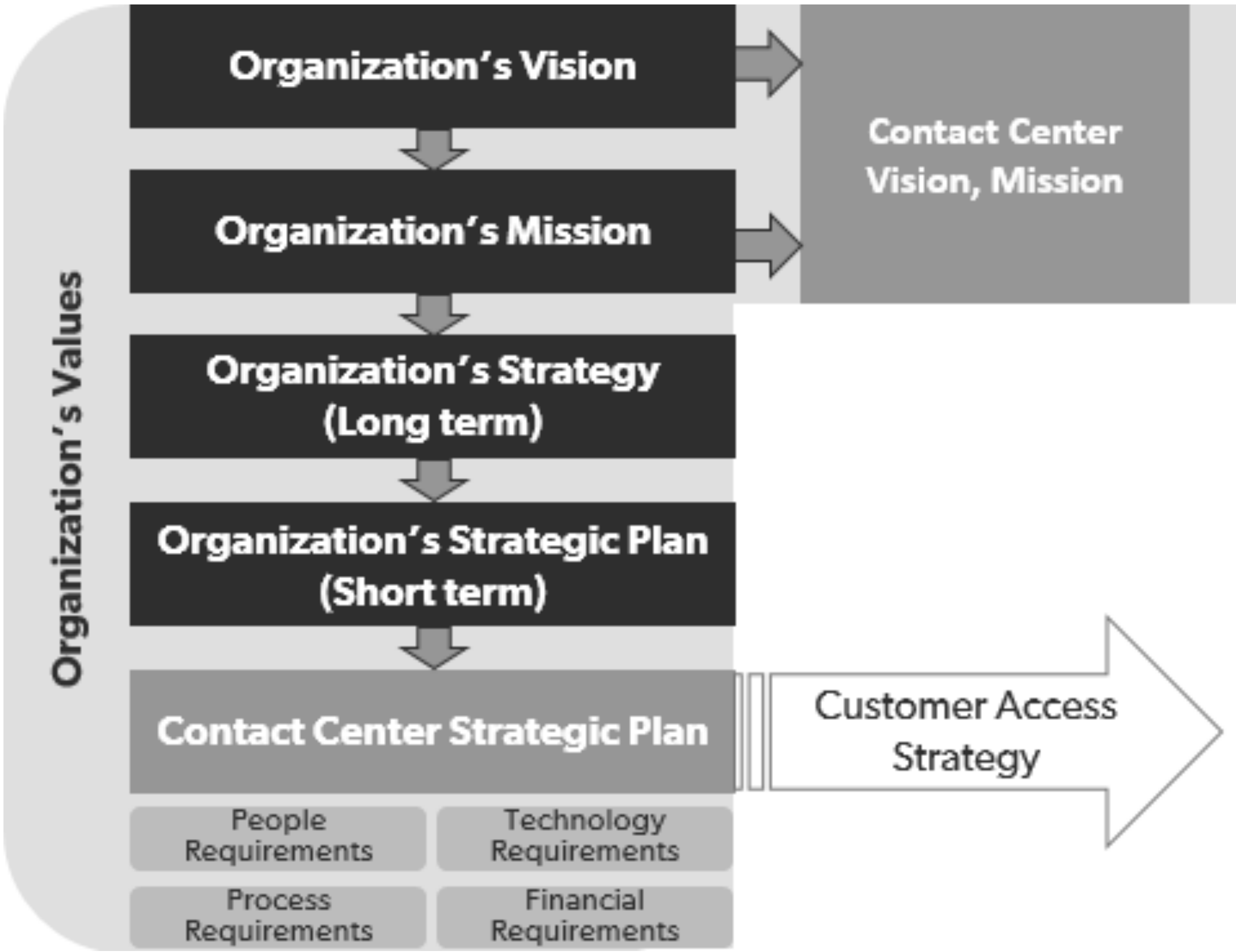
Opportunities: What are the opportunities to increase revenue or profits?

Infrastructure
Broad customer base
Partnerships

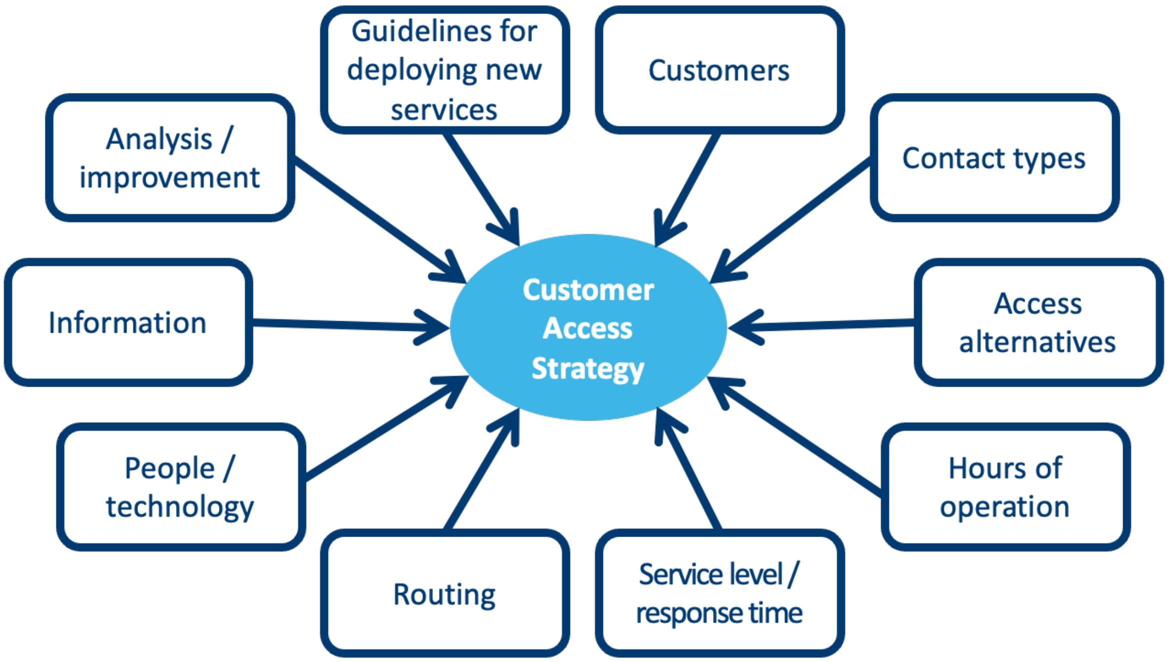
Threats: What threatens our ability to thrive?

Ease of entry
Lack of regulations
Profit margin constraints

Strategic Alignment Model



Customer Access Strategy



Exercise: The Evolving Customer Access Strategy

As contact centers move forward, they will be faced with the continued challenge of transforming all aspects of operations to support a customer experience model that is continually evolving and changing. This exercise asks you to consider how these changes will affect the overall customer strategy and how a Customer Access Strategy should address all aspects of a service transformation.

Instructions

Read the scenario on the next page and refer to your group's assigned sections on the following page. Then, turn to the Customer Access Strategy Template on the pages that follow and answer the lettered questions in your assigned sections. When you're finished, summarize your responses on a flip chart.

Scenario

You and your team have been working with Marketing to identify opportunities to leverage the new segmentation strategy to further enhance the customer experience, deepen relationships with customers and positively impact revenue and costs.

Through extensive research, Marketing has identified an opportunity to address the preferences of the Initiator segment and Connector segment. *See the pages that follow for an overview of each Customer Segment.*

These Customer Segments – who may or may not be current customers – complete the majority of their financial product research online. The Marketing and Information Technology teams have been working together and have identified the web navigation patterns of website Auto Insurance visitors. These visitors read about auto insurance but do not request a quote. It is unclear how many of these visitors ultimately contact the contact center.

The Information Technology Team and the Marketing Team are partnering to pilot technology that will pop a chat box to visitors who navigate through Auto Insurance web pages. The chat invitation invites the visitor to ask questions – and depending on the question, it will be answered by a bot or routed to a live agent.

Chat inquiries that require a live agent will be routed to the next available agent in the existing Auto chat queue with a higher priority than "regular" inbound chats.

Turn to the next page for your Group's assigned sections of the Customer Access Strategy.

Group Assignments

Your group's assigned sections are below. Make a note of your assigned sections and turn to the Customer Access Strategy on the pages that follow to complete your assigned sections.

Customer Access Strategy Section	Groups __, ___ Assignments	Groups __, __, __ Assignments
1. Customers		
2. Contact types		
3. Access alternatives		
4. Hours of operation		
5. Service level and response time objectives		
6. Routing methodology		
7. People / technology resources		
8. Information required		
9. Analysis and business unit collaborations		
10. Guidelines for deploying new services		

Customer Access Strategy

A **Customer Access Strategy** can be defined as "a framework—a set of standards, guidelines and processes—defining the means by which customers are enabled to access resources capable of delivering the desired information and services."

At some point in developing customer contact services, the need for an overall plan becomes obvious. Not only have management activities multiplied, the interrelated nature of decisions has implications for existing organizational structure and personnel responsibilities as well as on the allocation of resources. Every decision must be viewed in terms of its impact on others and on overall results and direction.

Your customer access strategy should help you formulate answers to many important questions. For example:

- How should your contact center be organized—e.g., how should agent groups be structured?
- What kinds of skills and knowledge will your agents, supervisors, and managers need? How should your hiring and training practices support these requirements?
- What system capabilities best support your strategy? Do you have what you need in house or will you need to build, buy or contract for required technologies?
- What kind of processes best support your plans? Where should they be refined or restructured?
- Is it feasible or advisable to outsource some or all of your contact center services? (If so, the customer access strategy is still the responsibility of the client organization.) What capabilities must the outsourcer have to support your requirements?
- Can contact center strategy help shape the organization's strategy (e.g., by helping to differentiate the organization's services)? Are the organization's overall strategy, contact center strategy and the realities of budgets and resources in alignment?

Customer Access Strategy Guidelines

As with corporate strategy, a customer access strategy can take many different forms. It can be used to analyze the needs of a customer or prospective customer segment or to analyze a new contact channel. In this example, we will consider the prospect of adding proactive contact offers via chat on the Auto website.

Component 1. Customers (could also include prospective customers)

Definition

Customer and prospective customers segments or groupings (e.g., by geography, purchasing behavior, demographics, volume of business or unique requirements) and how the organization will serve each segment. This should align with marketing segmentation and specify how the organization communicates with these customers and ensures coordination across units (e.g., informing the contact center of marketing campaigns).

a. Is the proactive chat a desired contact channel for the *Initiator* and *Connector* customer segments?
b. Is it a desired contact channel for any other customer segments? Should the technology be applied in other areas of the website to "capture" those customers?
c. Would you recommend other contact channels for these customer segments?

Your Responses

Component 2. Contact types

Definition

Anticipate and identify the major types of interactions that this customer type(s) will engage in, e.g., rate quotes, enrollment, inquiries, technical support. Each type of interaction should be analyzed for opportunities to build customer value and enhance customer satisfaction and loyalty.

a. Would we attempt to narrow the purpose of these proactive contacts? For example, would the chat say, “Would you like us to contact you for an Auto quote?” or “Is there anything we can help you with?”
b. What types of interactions (e.g., reasons for contacting) would be handled through this proactive channel? Would you limit the types of questions or concerns which could be resolved in this channel?

Your Responses

Component 3. Access alternatives

Definition

Identify the organization's communication channels (e.g., telephone, email, web, mobile apps, video, face-to-face service, postal mail, etc.) along with corresponding numbers, web URLs, email addresses, and postal addresses, etc.

a. Will the proactive chat channel affect current contact channels? For example, would these customer segments have otherwise called us?
b. Will we allow web surfers to "request" a proactive call without waiting for the chat? For example, "Have questions or want a personalized quote? Click here, and we'll call you right now!"
c. Would it be just as effective to publish the phone number on the page and encourage customers to call with their questions?

Your Responses

Component 4. Hours of operation

Definition

Identify the appropriate hours of operation to support these customer segments.

a. Will chat be offered the same hours as the contact center?
b. Will it be disabled if the contact center is not meeting service level or under other conditions?

Your Responses

Component 5. Service level and response time objectives

Definition

The organization's service level and response time objectives. Different objectives may be appropriate for different contact channels and customer segments.

a. How will these proactive contacts, which are routed through the inbound queue, affect our ability to meet service level?
b. Will they be treated the same or differently as an inbound call?
c. Is the accessibility expectation the same? Will you measure service level for this call segment separately from inbound calls?

Your Responses

Component 6. Routing methodology

Definition

How—by customer, type of contact and access channel— each contact will be routed and distributed within the contact centers. Applies to both inbound and outbound contacts.

a. Where should these contacts be routed?
b. Which agents can accept these calls? How will they be notified which calls are proactive contacts?
c. How will estimated wait time impact service level, sales, potentially customer satisfaction?
d. Do existing routing methodologies apply to support chat contacts?
e. Should these proactive contacts be routed to the front of the queue?

Your Responses

Component 7. People/technology resources required

Definition

The agents or systems required for each customer segment and contact type.

a. Who will handle the chat-generated contacts? Are specialized skills or training required for any of these contact types?
b. Are specialized tools or technology required for any of these contact types, beyond the basic chat functionality?
c. Will these contacts be tracked differently than inbound calls?

Your Responses

Component 8. Information required

Definition

The information about customer, products, and services that agents and callers need to complete the contact and the information that must be captured during contacts. This includes legal or regulatory privacy or reporting requirements.

a. What information do agents need to complete these proactive contacts? Will this information be pushed or pulled? For example, will the agent get a screen pop with the customer account number and information about where the customer was searching on the website?
b. Do specific legal or regulatory requirements apply to these contacts?

Your Responses

Component 9. Analysis and business unit collaboration

Definition

How the information captured and produced during contacts will be used to better understand customer and to improve products, services, and processes – especially those related to the focus of the customer access strategy. The major performance objectives and how the contact center's value and contributions will be measured.

a. How will the success of the chat contact initiative be measured?
b. What are the key metrics (overall and individual) associated with these contacts?
c. What information generated by this initiative is valuable to other business units?

Your Responses

Component 10. Guidelines for deploying new services

Definition

The plan should outline a framework for deploying new services, including technology architecture (corporate standards and technology migration plans) and investment guidelines (priorities for operational and capital expenditures). This step should also describe who would keep the customer access strategy current as services evolve—e.g., who has overall responsibility, how often the plan will be updated, and who has ownership of individual components.

a. What are the respective roles of Information Technology, Workforce Management, Marketing, and the Contact Center in implementing the technology and processes to support proactive chat?
b. What are the factors or guidelines we use to evaluate the benefits/drawbacks of new channels?
c. Will the program be piloted and what outcomes will indicate we should move forward? For example, cost/revenue ratios, effects on other channels, staffing costs, fit within overall strategy.

Your Responses

Bank US: Customer Segments Overview

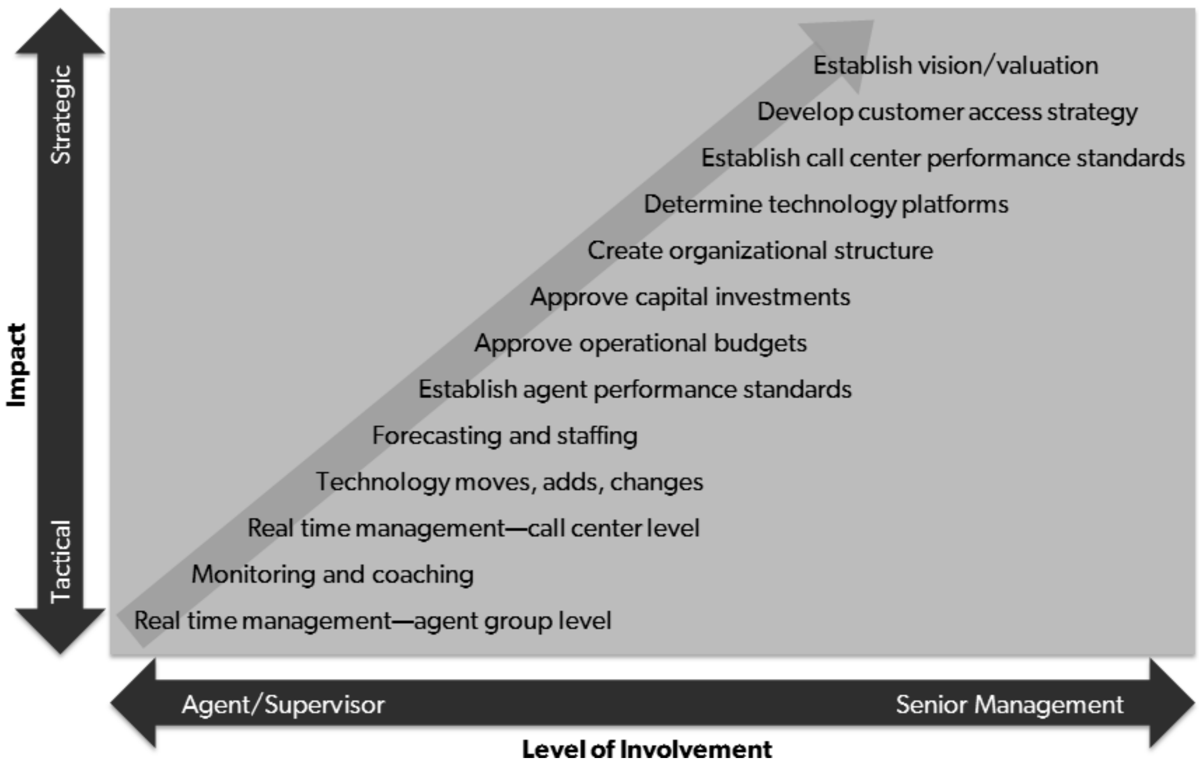
Stage of Life Segment	Initiators	Builders	Connectors	Accumulators	Sustainers
Needs	These customers are generally between the ages of 18 and 23 and are going through their first foundational life experiences such as graduating, first car etc. **Their primary needs** are focused on how to manage getting their first credit card, first loan(s); first automobile etc.	These customers are generally between the ages of 24 and 35 and have moved on to starting to build their families and careers. At this stage in their lives, they are generally borrowing more than investing. **Their primary needs** are focused on managing their debt load effectively since they often have many expenses.	These customers are generally between the ages of 36 and 45 and have established their families and careers. They are in their peak earning years and are beginning to think about reducing debt and saving for the future. **Their primary needs** are focused on reducing their debt load and start saving for the future.	These customers are generally between the ages of 46 and 60 and begun to focus on saving for retirement. Their focus has shifted to investing wisely. **Their primary needs** are focused on retirement. They want to understand if they've saved enough to retire, if they'll have to work to supplement their retirement income and/or adjust their lifestyle.	These customers are generally older than 60. Their main focus is on managing their retirement income. **Their primary needs** are focused on maximizing their retirement income and maintaining the lifestyle they desire. They also need to find ways to manage multiple income sources and effectively beginning estate planning.

Stage of Life Segment	Initiators	Builders	Connectors	Accumulators	Sustainers
Behaviors and Attitudes	• Spending more than saving • Want to do research on their own • Prefer making their own decisions • Work/life is out of balance • High users of technology • Shop around, consider price/value over brand names • Willing to take financial risks	• Frequent and early adopters of all forms of technology • Time and money savings are key, so customized solutions are critical	• Early adopters of technology • Comfortable with self-service, online and mobile applications • If/when seeking advice, they want customized solutions • Starting to plan and build financial safety net and reduce all debt/ expenses	• Expect customized, personalized solutions • Comfortable with technology but prefer live assistance over self-service • Have a financial plan and strategy in place • Are thinking and saving for the future	• Late adopters of technology • Prefer face-to-face services • Looking for advice and best return on investments.
Financial Needs / Concerns	Living paycheck to paycheck. Being able to pay bills and manage debt.	Ability to pay bills, reduce expenses and debt.	Getting out of debt; reducing all expenses and start/continue savings for retirement.	Live acceptably within a budget; invest wisely to ensure a comfortable and secure future.	Live comfortably within a budget; enjoy life now and in the future.

Stage of Life Segment	Initiators	Builders	Connectors	Accumulators	Sustainers
% of current customer base	26%	36%	6%	24%	8%
% of prospects	23%	33%	3%	11%	30%

Module 2: Turning Strategy into Reality

Strategy/Tactics Continuum



The Leader's Role in Strategic Planning

Strategy – Action Planning

Exercise: Action Planning Tool

The purpose of this exercise to consider the elements of an Action Plan which support the Strategic Planning Process.

Overview

Turn to the *Action Planning Tool* on the pages that follow. This tool contains questions in key areas that directly affect your strategic planning process. Each section mirrors the Strategic Planning Process introduced in this course. Evaluating each of these statements will assist in identifying areas that need to be included in your strategic plan as well as any potential improvement areas in your existing process.

Instructions:

1. Complete the Shaping Strategy section of the Action Planning Tool.
2. Evaluate the current state of your contact center(s) by assigning the item a rating (4-1) and noting ideas for actions in the right column.

Rating Key: 4 = Strongly Agree, 3= Agree, 2 = Disagree, 1 = Strongly Disagree

- A “3-4” response indicates that the contact center is well-positioned in this area (3) or that this area is a contact center advantage (4).
- You may wish to indicate an Action for “3” or “4” responses if there is room for improvement or the statement has only been partially addressed.
- A “1-2” response indicates that extensive (1) or minor (2) action is needed to improve processes in this area.

Action Planning Tool

Rating Key: 4 = Strongly Agree, 3= Agree, 2 = Disagree, 1 = Strongly Disagree

Strategic Development Statement	Rating 4 - 1	Action Items
1. Establishing Vision		
a. The contact center's role in enabling the organization to meet (and exceed) customers' expectations have been clearly identified and defined.		
b. Others across the organization understand and perceive the contact center's value.		
c. Your vision defines the contact center's role, not only in efficiently meeting customer demands, but also in contributing intelligence (captured during contacts) to other business units.		
2. Shaping Strategy		
a. Your contact center strategy supports the overall organization strategy and is aligned with other business unit strategies.		
b. You have a comprehensive and up-to-date customer access strategy.		
c. You have an ongoing strategic planning process.		

Rating Key: 4 = Strongly Agree, 3= Agree, 2 = Disagree, 1 = Strongly Disagree

Strategic Development Statement	Rating 4 - 1	Action Items
3. Building Skills, Knowledge, and Leaders		
a. You have a new-hire training program that provides agents with the knowledge and skills required to perform well.		
b. Your organizational structure is appropriate for your mission and objectives.		
c. You have a process to review job responsibilities and compensation if the focus or responsibilities of a job or a set of jobs changes.		
d. You tie individual and contact center-wide performance standards directly back to company mission, vision, and values and customer needs.		
e. Coaching and other performance management activities are frequent and ongoing in your contact center.		
f. You know the cost of agent turnover and its relationship to engagement and satisfaction.		
g. You have defined and developed attractive career- and skill-path alternatives for your employees.		

Rating Key: 4 = Strongly Agree, 3= Agree, 2 = Disagree, 1 = Strongly Disagree

Strategic Development Statement	Rating 4 - 1	Action Items
h. You have an individual development plan for each employee.		
i. You provide opportunities for contact center team members to participate in cross-functional teams and projects.		
j. You have a communication plan to ensure that people inside the center – and outside the contact center – are kept informed of results, events.		
k. You provide refresher, remedial, and supplemental training for existing employees.		
l. Management and leadership teams inside and outside the contact center have the required level of understanding (for their roles) of queuing dynamics. Everyone understands how changes across the organization affect the customer contact centers' ability to deliver service.		

Rating Key: 4 = Strongly Agree, 3= Agree, 2 = Disagree, 1 = Strongly Disagree

Strategic Development Statement	Rating 4 - 1	Action Items
4. Implementing Operational Plans and Processes		
a. You apply disciplined planning and management methodologies to all types of customer contacts. In other words, your planning process encompasses all contact types and contact channels.		
b. You are using planning tools and methods appropriate for your environment.		
c. You have process maps for key processes, including people, technologies, and resources involved and impacted.		
d. You have methods for reviewing and continuously improving forecasting, scheduling, and other key processes.		
e. You have processes in place to assess (and fix) the root causes of crises and periods when you did not meet objectives.		
f. You have an ongoing process to evaluate the voice of the customer and how processes should change to continue to reflect customer needs.		

Rating Key: 4 = Strongly Agree, 3= Agree, 2 = Disagree, 1 = Strongly Disagree

Strategic Development Statement	Rating 4 - 1	Action Items
g. The contact center considers the impact of process/procedure changes on the other processes/procedures within and outside the center.		
h. The contact center has a mechanism for ensuring that the organization considers the impact of changes to business processes/procedures on center processes and procedures.		
i. You have a process to push and/or allow pulling of required data and information to the appropriate areas of the business. (An example of “push” is WFM using on-hand counts for e-mail processing. An example of “pull” is Human Resources looking at AHT information when they need to start recruiting.)		
j. The center actively works towards educating other parts of the business on what the center is/does.		
k. The center actively works towards understanding other parts of the business.		

Rating Key: 4 = Strongly Agree, 3= Agree, 2 = Disagree, 1 = Strongly Disagree

Strategic Development Statement	Rating 4 - 1	Action Items
l. You have a process for communicating the tangible and intangible contribution(s) contact center processes and process improvements deliver to the organization.		
5. Establishing Enabling Technologies		
a. You have a current assessment of when/whether/how technology capabilities may support your business objectives.		
b. You have put together a realistic, accurate business case for the solutions you'll need in the next one to five years.		
c. You have assessed where your organization, customers, and technologies are on the technology adoption lifecycle.		
d. The contact center has an SLA with IT that includes defined goals for uptime percentages, response time per application, communication protocols, etc.		
e. The contact center receives reports from IT on its performance		

Rating Key: 4 = Strongly Agree, 3= Agree, 2 = Disagree, 1 = Strongly Disagree

Strategic Development Statement	Rating 4 - 1	Action Items
f. The contact center is involved in identifying and selecting new technologies and identifying possibilities for the future.		
g. You have developed implementation plans (for imminent technology projects) that will maximize project success.		
h. The center has clearly established goals and objectives for both disaster avoidance (Business Continuity Process – BCP) and recovery (Disaster Recovery Plan – DRP).		
i. The DRP considers technology, people, and facilities.		
j. The contact center has a dedicated IT representative and/or individuals who understand the unique demands of the contact center.		
k. The contact center understands the role IT and technology can play.		

Rating Key: 4 = Strongly Agree, 3= Agree, 2 = Disagree, 1 = Strongly Disagree

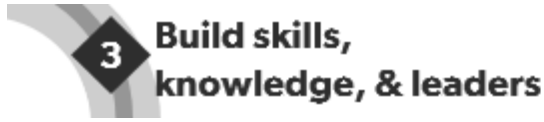
Strategic Development Statement	Rating 4 - 1	Action Items
6. Making Required Investments		
a. You have realistically analyzed/anticipated workload trends across all customer contact channels.		
b. You have assessed the capacities of current resources (staff, technologies, infrastructure) to accommodate temporary demands on resources, as well as sustained growth (if expected).		
c. You have an effective budgeting process that blends science (e.g., Erlang C) and business judgment (e.g., what your funding priorities should be).		
d. You have developed implementation plans (for imminent technology projects) that will maximize project success.		
e. You have good return on investment (ROI) models for assessing new opportunities and developments.		

Rating Key: 4 = Strongly Agree, 3= Agree, 2 = Disagree, 1 = Strongly Disagree

Strategic Development Statement	Rating 4 - 1	Action Items
7. Innovating and Aligning		
a. You have an up-to-date "map" of resident versus required management competencies in your contact center, and where you may have vulnerabilities (e.g., if a key person leaves).		
b. You have a systematic (organized) process for recognizing and cultivating upcoming managers and leaders.		
c. You have a supporting culture established through a shared vision, consistent values, the right objectives and opportunities for people to learn, grow, and contribute.		
d. You have a solid grasp of management trends and developments within the industry and in your organization (e.g., to understand directions and strategies that will be most accepted and appropriate going forward).		

Rating Key: 4 = Strongly Agree, 3= Agree, 2 = Disagree, 1 = Strongly Disagree

Strategic Development Statement	Rating 4 - 1	Action Items
e. You have envisioned what customer expectations will be in coming years and how you will meet them.		
f. You have established and funded a research and development and/or process improvement team in your contact center.		



Leader's Role—Building Skills, Knowledge, and Leaders

1. Establish the workforce development vision
2. Direct talent management
3. Support incentives and rewards
4. Create the right structure
5. Shape the supporting culture
6. Champion change management

Leader's Role—Implement Operational Plans and Processes

- Accountability for planning, implementation, maintenance, and ongoing improvement of all aspects of contact center operations
- Balance of strategy AND tactics
- Drive data and metrics to demonstrate value and inform business units

Leader's Role—Establishing Enabling Technologies

- Does it support the company's strategy and our strategic plan?
- What is the impact on customers, the business, employees?
- Establish credibility and build relationships to make sure you are at the table when technology decisions are made.

Leader's Role—Make the Required Investments

- Building the business case for investment
- Aligning and investing resources
- Assessing risk and understanding tradeoffs
- Evaluating and managing third party contractors and outsourcing

Module 3: Innovation in a New Era

Leader's Role—Innovate and align

- It might not be in your job description, but it's where your value lies
- This is what will take your strategy to the highest level

Question Everything

- What will the center look like in five years?
- What do our customers worry about today? What will they worry about tomorrow?
- How would we try to beat ourselves if we were our competitors? What weaknesses would we exploit?
- What strengths aren't we capitalizing upon?
- Are we settling for "good" when we really should be going for great?

Appendix

Sample Customer Access Strategy

This is an example of how a Customer Access Strategy template might be completed in response to Exercise 3. A Customer Access Strategy template can be completed for many purposes:

- As a comprehensive document to address all aspects of service and sales delivery
- As an problem-solving tool to address a specific contact type, customer segment or contact center concern
- As a pre-implementation checklist to ensure the potential impacts and requirements of a program are anticipated

Note: this is an illustrative example only. We've made some assumptions about the customer segment, the situation and the bank contact center capabilities to demonstrate how the Customer Access Strategy might be used.

Component	Definition	Exercise 3: Addressing Sustainer Customer Segments
1. Customers (could also include prospective customers)	Customer and prospective customers segments or groupings (e.g., by geography, purchasing behavior, demographics, volume of business or unique requirements) and how the organization will serve each segment. This should align with marketing segmentation and specifies how the organization communicates with these Customers and ensures coordination across units (e.g., informing the contact center of marketing campaigns).	*Sustainers*: This group is comfortable financially and lives within a budget. They are likely to do business with more than one financial services provider and prefer face-to-face interactions over technology-mediated communication. *Explore*: Does needs group profile include specific information about how these groups wish to be served? What do we know from the customer satisfaction data that can help us learn more about this group's desire for service and tolerance for sales?
2. Contact Types	Anticipate and identify the major types of interactions that this Customer type will engage in, e.g., rate quotes, enrollment, inquiries, and technical support. Each type of interaction should be analyzed for opportunities to build customer value and enhance	*Sustainers* are active in managing their accounts. They review their paper and online statements carefully and will pick up the phone if they have any concerns or questions. They are more likely to complain when they feel they should be heard and to persist until their concerns are addressed. Since these customers

Component	Definition	Exercise 3: Addressing Sustainer Customer Segments

	customer satisfaction and loyalty.	are high-contactors in the phone channel and represent a growth segment, this represents a tremendous opportunity for the contact center. *Explore*: What tracking and reporting exists to identify the reasons these customers call? Is the reason code distribution the same as other contact types? Are there clues in the reason codes that indicate potential causes of dissatisfaction? For example, do these customers analyze their bank statements more closely than other customer groups, and as a result, identify statement design flaws? Is this segment more sensitive to cross-selling and up selling? Are there clues as to whether referrals affect their satisfaction?
3. Access alternatives	Identify the organization's communication channels (e.g., telephone, email, text, web, IVR, face-to-face service, postal mail, etc.) along with corresponding numbers, Web URLs, email addresses, postal addresses et al.	*Sustainers* are most likely to use phone or email communications. In areas where there are branches, they are likely visit with questions and establish a relationship with branch staff. They will look up information online but are less likely to want to interact through electronic channels. While they are cell phone users, they have little interest in mobile banking unless they have a specific need. We currently offer the channels these customers use and do not anticipate the need to offer additional channels to these customers. *Explore*: Does advertising that stresses alternative modes of communication deter these customers, who may prefer

Component	Definition	Exercise 3: Addressing Sustainer Customer Segments
		simplicity? Are our phone and email addresses easy to find and are these channels easy to navigate? Is our website appealing, logical and easy-to-use for these customers?
4. Hours of operation	Identify the appropriate hours of operation to support these customer segments.	Overall, these customers have the flexibility to contact the contact center during traditional banking hours and are satisfied with regular business hours.
6. Routing methodology	How—by customer, type of contact and access channel— each contact will be routed and distributed within the contact centers. Applies to both inbound and outbound contacts.	Generally, these customers do not like to be transferred or called back. They have a strong preference to have all their issues and concerns handled by one agent in one contact. *Explore*: Should these customers be contacted via outbound sales channels? How will these contacts be tracked to ensure there is not overlap between inbound sales offers and outbound contacts? What are these customers' tolerance for sales? Are third party partners positioned to meet these customers' needs or should these customers' contacts be handed by the internal contact center only? Do these customers find it easy to route themselves to an agent who can handle their concerns or questions?
7. People / technology resources required	The agents or systems required for each customer segment and contact type.	These customers expect a streamlined call in which the agent is knowledgeable and prepared with customer and product information at their fingertips. These customers are educated about financial matters and have little tolerance for an agent who sounds uncertain or unprepared. They respect authority and confidence and are more likely to respond positively to an agent who sounds calm, knowledgeable and confident.

Component	Definition	Exercise 3: Addressing Sustainer Customer Segments
		While this is not a customer segment which is impressed by technology, they respect it and expect it to work. They have little tolerance for electronic self-service options which aren't intuitive or do not work as they expect them to. *Explore*: Do existing agents possess the skills to service and sell to this customer segment? Are current hiring, training and performance support processes adequate to prepare agents to serve and sell to these customers while maintaining high levels of customer satisfaction? Do the agents have the desktop tools necessary to handle these issues quickly and accurately?
8. Information required	The information about customer, products and services AGENTs and callers need to complete the contact and the information that must be captured during contacts. This includes legal or regulatory privacy or reporting requirements.	The Agent desktop is designed to address the general contact requirements but is not currently customized to meet the needs of any individual customer needs groups. *Explore*: Are agents able to see the customers' unified contact history? Are offers in the opportunity banner appropriate and are acceptance rates accurately tracked? Is the information available to not just service and sell, but proactively educate these customers?

Component	Definition	Exercise 3: Addressing Sustainer Customer Segments
9. Analysis and business unit collaboration	How the information captured and produced during contacts will be used to better understand customer and to improve products, services and processes – especially those related to the focus of the customer access strategy. The major performance objectives and how the contact center's value and contributions will be measured.	These customers represent an untapped customer segment (8% of existing customers with substantial opportunity to expand that). While the contact center can play a big part in designing service and sales that will appeal to this segment, strong relationships with Marketing and Customer Experience are necessary to ensure service and sales are designed to appeal to these customers. In addition, A strong understanding of contact center dynamics and the cost of service delivery in Finance will assist in resourcing service and sales approaches that will drive new customer acquisition, sales and service delivery that meets the expectations of this customer group. *Explore*: What information do we currently collect and report on and is it adequate to inform our internal business partners? How can we continue to learn more about this customer needs segment? Is there information we should be asking/gathering during customer interactions to better understand these customers and refine products/services?
10. Guidelines for deploying new services	The plan should outline a framework for deploying new services, including technology architecture (corporate standards and technology migration plans) and investment guidelines (priorities for operational and capital expenditures). This step should also describe who would keep the customer access strategy current as services evolve—e.g., who has overall responsibility, how often the plan will be updated, and who has ownership of individual components.	The bank contact center owns the pursuit of answers to the exploration questions in this document and will partner with the Mary Ross and the Marketing team to ensure that the prospects and new customers in this needs group are serviced appropriately and issues that negatively affect customer satisfaction are addressed.

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