**Instructions:** Ready to start? Fill in this table to complete a Customer Access Strategy. Depending on how you use this template, if you want more space, delete the **Roadblocks** and **Owners/Stakeholders** columns.

Refer to the end of this document for component definitions.

* Begin to map out the customers access strategy in the **Description** column.
* **Roadblocks** are people, process, or technology considerations we’ll need to address to deliver on that component.
* **Owners** are the people who ultimately own, manage, approve, or control this component.
* **Stakeholders** are the people who are impacted by this component. For example, if we decide to expand our operating hours Finance, WFM and the Operations team are Owners, and Agents and Supervisors are Stakeholders.

| **Component** | **Description**  | **Roadblocks**  | **Owners/Stakeholders** |
| --- | --- | --- | --- |
| **1. Customers** (could also include prospective 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 required** |  |  |  |
| **8. Information required** |  |  |  |
| **9. Analysis and business unit collaboration** |  |  |  |
| **10. Guidelines for deploying new services** |  |  |  |

**Component 1. Customers (could also include prospective customers)**

This part of your strategy should summarize how customers are segmented (e.g., by geography, volume of business, level of service purchased, unique requirements, or other characteristics) so that you can shape specific services that are just right. Customer segmentation typically comes from the organization’s marketing strategy. However, given the operational requirements of serving different customers appropriately, I’ve noticed that contact center managers are increasingly involved in this effort.

**Component 2. Contact types**

This step identifies the major types of interactions that will occur (e.g., inquiries, orders, support). Think through how each type of interaction could improve customer loyalty and build value. For example, some you’ll work to eliminate (through improved products and services), some you’ll want to automate through self-service, and some will best be served with the involvement of an agent.

**Component 3. Access alternatives**

This step—where strategy really begins to hit home for contact centers— identifies all of the possible communication channels (phone, chat, email, social media, text, video, face-to-face, self-service, customer communities ... the lot) along with corresponding telephone numbers, web ad- dresses, email addresses, social media usernames, IVR menus, physical addresses, etc. Where more than one channel is involved in an interaction (say, when a customer begins in an app and has a conversation with an agent) define as many possible combinations as you can.

**Component 4. Hours of operation**

This part of your strategy defines appropriate hours of operation. These can vary for different contact channels or types of interactions. Generally, self-service applications will always be available. Some agent-assisted services may be available 24/7, while others may have more limited hours. For example, customers can report emergencies such as downed power lines to their utility any time of day or night, with general customer service (billing inquiries, etc.) available during the day.

**Component 5. Service level and response time objectives**

This step summarizes the organization’s service level and response time objectives (see Chapter 4). Different objectives may be appropriate for different types of interactions, contact channels, and customer segments.

**Component 6. Routing methodology**

This part of the plan covers how—by customer, type of interaction and access channel—each contact is going to be routed and distributed. While these terms have inbound connotations, this also applies to outbound; for example, when the organization originates the contact, through which agent group will the contact be made?

**Component 7. People/technology resources required**

This step transitions from “getting the contact to the right place at the right time” to “doing the right things.” Which agents or systems will be required for each customer segment and contact type?

**Component 8. Information required**

What information on customers, products, services, and policies will need to be accessible to agents and customers? What information should be captured during interactions? How will the organization meet applicable privacy or reporting requirements?

**Component 9. Analysis and business unit collaboration**

This step defines how the information captured or created during contacts will be used to better understand customers and to improve products, services, and processes. You may also want to summarize major performance objectives and how the contact center’s value and contributions will be measured.

**Component 10. Guidelines for deploying new services**

Finally, your 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 will keep the customer access strategy current as services evolve: who has overall responsibility, how often the plan will be updated, and who has ownership of individual components.