

Customer Access Strategy Worksheet

A **Customer Access Strategy** is “a framework—a set of standards, guidelines and processes—describing the means by which customers and the organization can interact and are enabled to access the information, services and expertise needed” (Brad Cleveland, *Leading the Customer Experience*, page 93.) As with a business plan, a customer access strategy can take many different forms. The following 10 components should be part of the plan.

Component	Definition	Notes (How you will define and document components and the “owner” of each)
1. Customer Segments	Customer segments or groupings (e.g., by geography, purchasing behavior, volume of business, or unique requirements) and how the organization will serve each segment.	
2. Types of Interactions	Major types of interactions by customer segment, e.g., placing orders, customer service, technical support, and others.	

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3. Access Channels	Communication channels (phone, chat, email, social media, text, video, app on smartphone or smart-watch, face-to-face, self-service, customer communities, etc.) along with corresponding telephone numbers, web addresses, email addresses, social media usernames, IVR menus, physical addresses, etc.	
4. Hours of Operation	Appropriate hours of operation to support customer segments, contact types, and access channels.	
5. Service Level and Response Time Objectives	The organization’s service level and response time objectives. These define the organization’s objectives for speed of getting help. Different objectives may be appropriate for different contact channels and customer segments.	

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6. Routing Methodology	How—by customer, type of interaction and access channel— each customer interaction will be routed and distributed to the right place.	
7. People/ Technology Resources Required	The employees and systems required for each customer segment and interaction type.	
8. Information Required	The information needed (e.g., about customers, products, services, policies, etc.) to handle customer interactions, as well as the information that should be captured during interactions.	

Component	Definition	Notes (How you will define and document components and the “owner” of each)
9. Analysis, Improvement	How the information captured and produced during interactions will be used to better understand customers and to improve products, services and processes.	
10. Guidelines for Deploying New Services	Considerations around 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.	

Example

Customer access strategies are like business plans in that some are well-documented and others exist only in pieces and in the heads of various managers. But there are standout examples of plans that are effective and up to date.

A mobile phone company has a well-organized customer access strategy. It consists of a cleanly designed home page on an internal website, the centerpiece, which provides links to each of the individual components. The links access files (databases, documents, etc.) that make up the different parts of their plan, such as customer segments, access numbers and addresses, routing diagrams, agent groups, hours of operation, service level objectives, and so forth. There are also links within these areas that allow you to logically move to others — but the home page will always get you back to the main directory. The plan could be printed, but would be many pages, given the detail of numbers, routing diagrams, etc., and is readily accessed by the team through a secure online resource.

The most impressive aspect of the plan is that it lists who is responsible for keeping the overall plan current, and the individuals who have ownership over various components: marketing (customer segments), IT/telecom (routing schematics) and others. Each document has an “updated on ____” date. The plan is current, and they don’t make major decisions without referring to it.