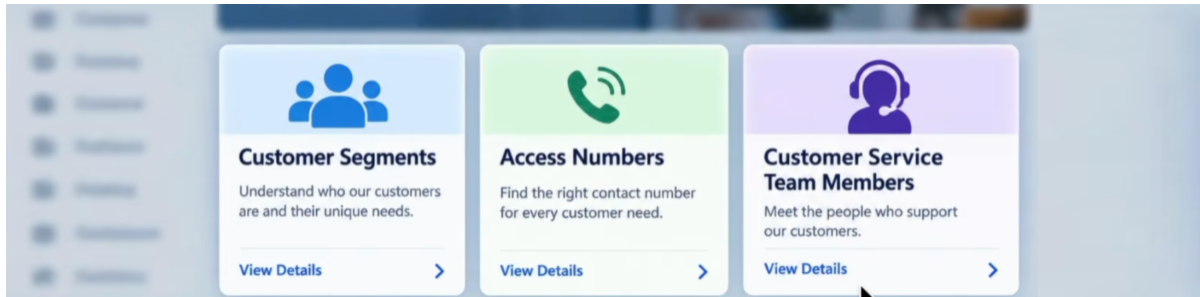


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10 Things Every Customer Service Strategy Must Have

Most organizations have a customer-service strategy, at least in pieces. But too often, it is undocumented, outdated, or scattered across departments.

That is risky, especially as AI, customer expectations, competitors, and service channels keep changing. The organizations that handle this well work from a clear customer access strategy: a shared plan for how customers will get help.

Here, I'll walk through the ten components of that plan and how you can begin applying them in your organization.

In customer service, strategy takes the form of a specific plan, often called a customer access strategy or simply a service strategy. An effective strategy includes 10 components. If these are new to you, begin by considering how they work together.

First, consider **Customer Segments**. In large organizations, this is typically defined along with marketing, and it summarizes how customers are logically segmented. (For example, insurance companies will identify segments by the policies needed, where customers are located, whether they are business or consumer, and so forth.) Even the smallest organizations have segments to consider. A restaurant, for example, may serve local residents, visitors, business diners, and private-event customers.

Second, identify **Types of Interactions**. For example, placing orders, customer service, technical support, and others. You can get as specific as you need in order to define the skills your team (including human and AI agents) will need.

You'll then look at **Access Channels**. Here, you'll identify how customer service is delivered. That might include in-person, phone or video call, text, social channels, messaging, self-service, and other digital options.

Next, consider **Hours of Operation** and how they may vary for different types of interactions. Self-service, such as through your app or website, will be available 24x7, but

you'll need to decide what makes sense for other alternatives.

The fifth step establishes your **Accessibility Standards**: How quickly should customers be able to reach help, and how long should they reasonably have to wait?

Next, you'll consider **Routing**. How is each customer going to be routed to the right person or team who can handle the issue?

The next component summarizes the **People and Technology Resources Required**. Which employees and which systems will come into play for each type of interaction?

The eighth component of your plan summarizes the **Information Requirements**. What information on customers, products and services will need to be accessible? What information should be captured during the service interaction?

In the next step, **Analysis and Improvement**, you'll define how the information captured will be used to better understand customers and to improve products and services.

In the final step, **Deploying New Services**, your plan should summarize technology needs, investment guidelines and other considerations as you bring new services into the mix.

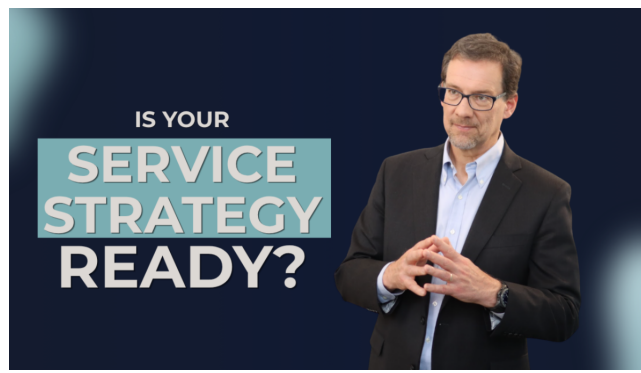
1. Customer segments
2. Types of interactions
3. Access channels
4. Hours of operation
5. Accessibility standards
6. Routing
7. People and technology
8. Information requirements
9. Analysis and improvement
10. Deploying new services



You might be thinking, whew, there's a lot to it! But I've found without fail that the thought you put into your strategy will come back to you in time, clarity, and better decisions. And I've found that teams collaborate more effectively when working from a common plan.

So start simple and begin to define these ten components. You will soon see the benefits of having a common plan to work from.

Customers do not think in terms of channels or departments. They simply think, "I'm going to contact XYZ Company." The best-led organizations understand that and build a customer access strategy that lets their brand shine through.



Watch the video!

Did you know?

64% of agents say having a unified view of customer interactions across channels would improve performance.

Source: Zendesk, CX Trends Report

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