# Customer Service Plan

## [Company Name]

Prepared by: [Author name] | Date: [Date]

## Executive summary

**Purpose:** [Summarize the goals and purpose of the customer service plan]

## Customer service goals and metrics

* **Goals:**
	+ [Add specific goals. Example: “Achieve a 90% first-contact resolution rate.”]
* **Metrics:**
	+ [Define measurable KPIs. Example: “Net Promoter Score (NPS), Customer Satisfaction (CSAT)”]

## Tools, technologies and budget

* **Tools and technologies:**
	+ [List tools. Example CRM, knowledge base, chatbot, analytics, AI]
	+ Discuss how each tool will be used in the process. Include links when appropriate.
* **Budget**
	+ [Include allocated budget for customer service operations]
	+ [List by line item, if appropriate]

## Team structure and workflow

* **Team roles and responsibilities:**
	+ [List the team members and their roles. Example: “Customer Service Manager, Support Representative.”]
* **Workflow:**
	+ [Outline workflows. Example: “Ticket escalation process, Incoming live chat, Inbound call.”]
* **Example sentiments and responses**

|  |  |
| --- | --- |
| **Sentiment** | **Response strategy**  |
| Positive / Satisfied  | Express gratitude and ask for referrals |
| Neutral | Gather feedback and improve the experience |
| Negative / Frustrated  | Apologize, resolve issues quickly and follow up. |

## Customer personas and strategies

* **Persona name:** [e.g., “Tech-savvy Tom”]
	+ Demographics: [Age, location, occupation]
	+ Pain points: [Common issues this persona faces]
	+ Preferred channels: [How they prefer to interact. Examples: Email, phone, chat, etc.]
	+ Customer service strategy: [What approach should be taken to meet this persona’s needs]

## Policies and procedures

* **Customer interaction policies:**
	+ [Outline key steps for rolling out the customer service plan.]
* **Escalation procedures:**
	+ [Define steps for escalating complex issues.]

## Action plan for implementation

* **Phased implementation:**
	+ [Outline key steps for rolling out the customer service plan]
* **Timeline:**
	+ [Add deadlines and milestone checkpoints]

## Continuous improvement plan

* **Feedback mechanisms:**
	+ [List tools and methods for gathering customer and employee feedback.]
* **Evaluation schedule:**
	+ [Define frequency of plan reviews and updates.]

## Sample Customer Service Rep Table

[This is an optional table that can be used by CS reps when engaging with a customer to keep track of important details. Ideally, this information is captured within the technologies used, but this can act as a foundation for the data that should be included in those tools]

|  |  |
| --- | --- |
| **Field** | **Description/Notes** |
| **Date and Time** | [Enter the date and time of the interaction.] |
| **Representative Name** | [Name of the customer service representative.] |
| **Customer Name** | [Full name of the customer.] |
| **Customer Contact Info** | [Phone number, email address or preferred contact method.] |
| **Customer ID (if any)** | [Unique identifier or account number.] |
| **Issue Type** | [Select the type of issue: Billing, Technical, Support, etc.] |
| **Description of Issue** | [Detailed description of the customer’s concern or problem.] |
| **Resolution Provided** | [Describe the solution offered or actions taken.] |
| **Escalation Required?** | [Yes/No. If Yes, provide details of escalation.] |
| **Follow-Up Needed?** | [Yes/No. If Yes, specify what follow-up is required.] |
| **Follow-Up Date** | [Date when follow-up is scheduled.] |
| **Customer Sentiment** | [Select: Satisfied, Neutral, Dissatisfied.] |
| **Additional Notes** | [Add any other relevant details or observations.] |