

# Worksheet for creating your contact centre strategy

Formulating a strategy for your contact centre is difficult, especially in the turbulent and uncertain circumstances we are facing right now.

We have created this worksheet to help you prepare for various scenarios. Building on the insights shared in this Buyer's Guide, you can confidently shape your contact centre into a powerful and efficient solution, designed to satisfy the most demanding customers as well as ensure a profitable operation of your business.

## How to use this worksheet?

There are two tables – one as an example and another for you to copy and use as a template. Once you have your scenarios mapped out, identify priorities and start planning your next projects. This will help you to decide where to invest your resources to ensure a future-proof, customer-centric running of your contact centre.

## Creating a Contact Centre Strategy

Scenario: Coronavirus forcing us into lockdown

Timeframe	Immediate	6-Month	1 Year
<b>What do you need your contact centre to deliver?</b>	<ul style="list-style-type: none"><li>• Fully remote team</li><li>• Maintain service levels</li><li>• Deal with increased contact volumes</li></ul>	<ul style="list-style-type: none"><li>• Expand remote workforce</li><li>• Improve service levels</li><li>• Improved self-service facilities</li></ul>	<ul style="list-style-type: none"><li>• Efficient, remote operation</li><li>• Highest standards in CX</li><li>• Increased levels of automation</li></ul>
<b>What challenges are you facing?</b>	<ul style="list-style-type: none"><li>• Issues with remote setup</li><li>• High contact volumes</li><li>• Technical issues</li></ul>	<ul style="list-style-type: none"><li>• Staff turnover</li><li>• Remote management</li><li>• Reporting &amp; Quality Control</li></ul>	<ul style="list-style-type: none"><li>• Track and predict pipeline</li><li>• Increase revenue</li><li>• Staff motivation &amp; performance</li></ul>
<b>What goals need to be prioritised?</b>	<ul style="list-style-type: none"><li>• Resolving technical issues</li><li>• Respond to demand</li><li>• Staff support &amp; wellbeing</li></ul>	<ul style="list-style-type: none"><li>• Staff retention</li><li>• Quality assurance</li><li>• Improvement to business processes</li></ul>	<ul style="list-style-type: none"><li>• Increase sales pipeline</li><li>• Expand team of highly-qualified, specialised agents</li><li>• Staff wellbeing</li></ul>
<b>What resources do you need to invest in?</b>	<ul style="list-style-type: none"><li>• Remote technology incl. peripheral equipment, software, security</li><li>• Collaboration &amp; Communication</li></ul>	<ul style="list-style-type: none"><li>• Virtual onboarding, training and coaching</li><li>• Knowledge Management tools</li><li>• Call Recording</li></ul>	<ul style="list-style-type: none"><li>• AI &amp; automation</li><li>• Self-service</li><li>• Mobile customer service</li></ul>

# Creating a Contact Centre Strategy

Scenario:

Timeframe	Immediate	6-Month	1 Year
What do you need your contact centre to deliver?			
What challenges are you facing?			
What goals need to be prioritised?			
What resources do you need to invest in?			