



JPPF Registry Resources - Customer service workshop action plan

Introduction:

The outcome of the Customer Service workshop is to produce an action plan for how you will improve your customer service. This may be you as an individual or as a member of a team or office.

You may focus on obtaining or improving a skill, a behaviour or introducing a process to be used in your office.

Once you have identified a goal, use the attached template to help work out the details. There is also an example of an action plan of the last page. Both use **SMART** objectives that are explained below:

S – Be **Specific** about what you want to achieve, do not be ambiguous, communicate clearly.

M – Ensure your result is **Measurable**. Have a clearly defined outcome and ensure this is measurable.

A – Make sure it is **Appropriate**. Is it an **Achievable** outcome?

R – Check that it is **Realistic**, it must be possible taking account of time, ability and resources.

T – Make sure it is **Timebound**. Set yourself an achievable timeframe, set deadlines and milestones to check your progress.

customer service action plan template:

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| Action: Improve customer service by: | | |
| Specific | Identify what you will concentrate on - a skill, behaviour or change of process. How will you do that? | |
| Measurable | What does success look like? Will that be something you do all the time, for all customers? How will you tell when you succeed? How will others tell when you have succeeded? | |
| Appropriate/Achievable | Does this fit with your organisation? Is it something that you can implement? | |
| Realistic | Do you need to rely on others? Does it require resourcing or approval? | |
| Timebound | When can you get things done, how long will it take? | |
| Staff responsible | Who needs to be involved, what do they have to do? | |

Example customer service action plan:

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| <p>Action: Improve customer service by creating and using an information sheet for customers: We spend a lot of time at the counter helping customers fill in their application forms and explaining to them what is required and what will happen next. They come from outlying areas only to find out that they need more information so can't file their application on this trip.</p> | |
| Specific | Create an information sheet for customers explaining in detail what is required to file an application and what happens next. |
| Measurable | The information sheet created and approved to use. We will be seen to use the information sheet at the counter when-ever dealing with a customer whose application is incomplete. We will spend less time at the counter having to explain things. |
| Appropriate/Achievable | I can create the information sheet I can get feedback from other staff to make sure the information sheet is accurate and complete I will need to get my manager's approval to do these things |
| Realistic | We have the knowledge of how to check applications so just need to write it up for everybody to use. My manager may need to escalate the idea to obtain approval. It would be good to have the information sheet shared publicly so customers could access it before they come to the office, but I will concentrate on getting it into place before exploring this further. |
| Timebound | I will draft the information sheet within one month I will seek feedback from colleagues and complete the draft within two months and present it to my manager I estimate a further month is needed to get approval to use the sheet which means we could be using it in 3 months' time. |
| Staff responsible | I will present my action plan to manager immediately for consideration. I will draft the information sheet within one month I will seek feedback from colleagues and redraft within one month I will present it to my manager for approval and estimate another month for them to obtain approval The manager will need to present the information sheet to the counter staff for use. I will discuss with my manager about what is needed to get the information sheet published once it is in place. |