

Engagement Plan

Use this worksheet to create a plan for engaging employees with the customer service vision and your service culture.

Overview

The purpose of your plan is to ensure all employees can answer three questions about the customer service vision:

1. What is it?
2. What does it mean?
3. How do I personally contribute?

Phase 1. Announcement: What Is the Vision?

Share the new customer service vision with employees via at least two or three methods. This ideally includes a statement or presentation from a senior leader, such as the CEO.

Phase 2. Training: What Does the Vision Mean?

Help employees understand what the customer service vision means. This might consist of formal training classes, webinars, town hall meetings, or other events.

Phase 3. One-on-One Coaching: How Do I Personally Contribute?

Help individual employees understand how their role aligns with the vision.