

From queue to customer journey

Four phases, sixteen steps. Tick what already stands; leave what's open for your next session.

Organisation _____ Owner _____ Date _____

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PHASE 1

Organise and secure commitment

- ☐ Put a project team together
- ☐ Name one ambassador who owns customer and contact-centre improvement
- ☐ Get commitment across the organisation to improve
- ☐ Set the budget
- ☐ State the ambition

WHY THIS MATTERS

The contact centre is often treated as "the queue" — but that queue is usually created by unclear decisions elsewhere. Improvement only works when the mandate reaches beyond the contact centre itself.



PHASE 2

Describe the customer journey

- ☐ Use a framework to describe the role and the journey, across every channel
- ☐ Define your customer, or your different customer groups
- ☐ Pick the channels that fit each customer group
- ☐ Always offer a human on the other end

WHY THIS MATTERS

Automation is good, but some cases will always ask for human contact — a bereavement, for instance, does not belong in a menu tree. Channel choice follows the customer group and the reason, never the reverse.



PHASE 3

Optimise with AI

- ☐ Decide on the primary goal for deploying AI
- ☐ Set one measurable customer goal alongside your cost goal
- ☐ Take stock of the data you already have
- ☐ Work out where the quickest win sits

WHY THIS MATTERS

The cost goal is usually the leading measure, and that's legitimate. But without a measurable customer goal beside it, the conversation ends up only about money, and the customer drops out of sight.



PHASE 4

Evaluate and improve

- ☐ Evaluate against the measurable customer goal you set
- ☐ Set up a fixed loop for evaluating and improving
- ☐ Switch on, try, evaluate, then continue or switch off

WHY THIS MATTERS

Cloud supports this way of working: continuous improvement gets cheap once an experiment is no longer a project. Switching something off is a valid outcome, not a failure.