



Strategic Planning Guide

How to create a one-page strategic plan
that **Customer Service & Support Leaders**
will actually use

Craft a clear, measurable, easy to communicate strategic plan

Strategy defines what an enterprise will do to be successful — how it plans to compete and win in its chosen markets or deliver the expected services to the citizen and fulfill its public mission.

A strategy is specific for an enterprise, in a specific environment, aiming at a specific objective in a specific point in time.

It is that strategy from which you generate strategic plans (and then operational plans) that answers how the enterprise will get there.

At a functional level, strategic planning defines the roadmap for executing the choices and actions required to meet strategic goals that reflect the function's contribution to the enterprise business model and goals.

Today's disrupted conditions make it even more important for strategic plans to be clear, measurable and easy to communicate.

Key components include the following:

1. A few metrics that define the function's current and target end state
2. The most critical assumptions underpinning the plan
3. The key initiatives required to achieve the end state
4. A concise statement that distills and communicates the strategy

Key actions in strategic planning

01 Identify a shortlist of metrics to describe the function's target state

To brainstorm appropriate metrics to measure your function's target state, first confer with business leaders and other stakeholders to make sure you're clear on the overarching business strategy and goals. Then identify metrics that relate directly to your stated outcomes.

You'll need to estimate the metrics' value on Day 1 to track your progress. The period to achieve those targets may be as short as a quarter or as long as five years — depending in part on the volatility of the current environment and the need to give a strategy a chance to work. Longer-term goals should still be tracked at least quarterly.

Limit the core plan to no more than seven metrics, initiatives or critical assumptions to keep the strategic plan easy to communicate.

02 Document and monitor key assumptions

The assumptions that underpin your strategy are essential tools for communication because they reflect why the target end state and required initiatives are better than alternatives and they form the cognitive foundation of the selected strategy.

In articulating the central value drivers for your function, include explicit cause-and-effect relationships and interdependencies where they exist among, e.g., the business ecosystem (initial and target), key initiatives and external driving forces. Incorporate assumptions developed during scenario planning to better understand which of these relationships are highly reliable “truths” while others represent highly uncertain dynamics difficult to control or predict.

Make sure the assumptions are concrete, with quantifiable thresholds for monitoring, and frequently monitor the assumption thresholds to watch for advanced warning of an imminent breach. The breach of one of these assumptions would trigger an urgent course correction.

Key actions in strategic planning

03 Identify key initiatives and milestones required to move to the end state

To identify the select key initiatives that drive focused but validated planning, include initiatives that:

- Represent your agenda to change the business, not just run the business
- Seek to create value beyond the existing business trajectory
- Demonstrate real action by grouping smaller projects under the initiative as necessary


The plan doesn't need to include initiatives intended to run the business, such as "keep serving our customers" or "maintain employee engagement." These initiatives strive to perpetuate the current state or trajectory.

After specifying the initiatives, set criteria and dates for key milestones and completion.

 **Build a Strategic Plan You Can Use**

04 Craft a concise statement that captures the essence of the strategy

In creating a statement to surmise the essence or core elements of a strategy, strive for a single, aspirational sentence — but be willing to sacrifice conciseness for clarity. The focus should be more on getting the essential elements right than on finding the perfect turns of phrase. Teams caught in endless debate over wordsmithing have likely gone too far.

 The components of the strategic plan can be documented on a single page, making it easy to communicate (see Page 5).

“Waste-free” strategic planning

By boiling strategic planning down to only these necessary and sufficient parts, you're taking a waste-free planning approach. It enables:


- Faster, but more collaborative, strategy formulation
- Quicker and more effective communication to implementers (with less lost in translation)
- Earlier course correction
- More objective measurement and allocation of performance gaps between strategy formulation and execution

Strategic Plan on a Page for Customer Service & Support Leaders, 20XX-20XX

Document the key elements of your strategy on one page. Examples are illustrative.

Current state	Plan	Future state
<p>Measured by 4 to 7 metrics</p> <p>Do</p> <ul style="list-style-type: none"> Accurately measure the organization's baseline and progress toward target state Capture mission-critical risks to running the business metrics <p>Don't</p> <ul style="list-style-type: none"> Create overly detailed metrics related to day-to-day performance <p>Example: Customer effort score of 5.2 out of 7</p> <p>Example: First contact resolution — 74% for the current state</p>	<p>Constituted of 4 to 7 initiatives</p> <p>Do</p> <ul style="list-style-type: none"> Reconcile conflicting views Build strong buy-in Focus resources and attention <p>Don't</p> <ul style="list-style-type: none"> Push ahead without consensus and buy-in <p>Example: Update CRM system to pull customer information.</p> <p>Example: Simplify the self-service website and guide customers to the best service channel to improve CX and reduce contacts.</p> <p>Rationalized by 4 to 7 assumptions</p> <p>Do</p> <ul style="list-style-type: none"> Communicate explicitly Specify quantifiable thresholds Allow for real-time course corrections <p>Don't</p> <ul style="list-style-type: none"> Create confusion or disagreement around basis of strategy <p>Example: Live service costs xx times as much as self-service.</p> <p>Example: 40% or more of today's live volume could be resolved in self-service channels.</p> <p>Expressed as 1 sentence</p> <p>Do</p> <ul style="list-style-type: none"> Capture the essence of the strategy <p>Don't</p> <ul style="list-style-type: none"> Create doubt around what constitutes strategy <p>Example: Drive and support top-line growth by providing a more consistent and seamless customer service experience.</p>	<p>Measured by 4 to 7 targets</p> <p>Do</p> <ul style="list-style-type: none"> Describe the organization's desired end state Set goals to determine when the end state will be reached <p>Don't</p> <ul style="list-style-type: none"> Target scenarios too distant from the current state <p>Example: Customer effort score — 5.75 out of 7 within 6 months</p> <p>Example: First contact resolution — 79% in 8 months</p>

Strategic Plan on a Page Template

 Type in the fields below to complete the interactive form.

Current state	Plan	Future state
<p>Measured by 4 to 7 metrics</p>	<p>Constituted of 4 to 7 initiatives</p>	<p>Measured by 4 to 7 targets</p>
	<p>Rationalized by 4 to 7 assumptions</p>	
	<p>Expressed as 1 sentence</p>	

Actionable, objective insight

Explore these additional complimentary resources and tools for Customer Service & Support Leaders:

Research



The Future of Customer Service

Develop your strategy for building a value-driven customer service function.

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Tools



Customer Service Benchmarks and Diagnostics

Identify strengths and gaps to develop a course of action and achieve your goals.

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Research



The Customer Value Advantage

Capture untapped opportunity for customer service to drive loyalty and retention.

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Article



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