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Gartner for Customer Service & Support

# The Head of Customer Service and Support's First 100 Days

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New customer service and support leaders set the foundation for success and the future of the organization's performance during their first 100 days. Use this five-phase roadmap to help define and secure early wins that will earn your team's confidence.



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## Overview

### Key Findings

- Customer service and support leader success depends on two complementary achievements: establishing a foundational, personal brand of credible leadership and laying the foundation for a sound customer service operation that delivers excellence in customer experience.
- Customer service leaders must focus the service team on delivering value to the organization as a whole, balancing strategic, tactical, and relationship-building skills with their peers, as well as earning the trust of their organization.
- Customer service leaders who professionally and emotionally invest in communication about new initiatives and changes will build strong relationships with their new teams and cross-functional partners. High decision-making visibility (i.e., executive communications where the executive shares context behind strategic decisions) leads to positive messages and acceptance among employees.
- Customer service leaders must identify ways to improve short-term KPI performance and objectively evaluate the organization's strengths and weaknesses regarding the current people, processes, and technologies while making decisions around the organization.

### Recommendations

To build a foundation for future success and establish leadership, take these steps:

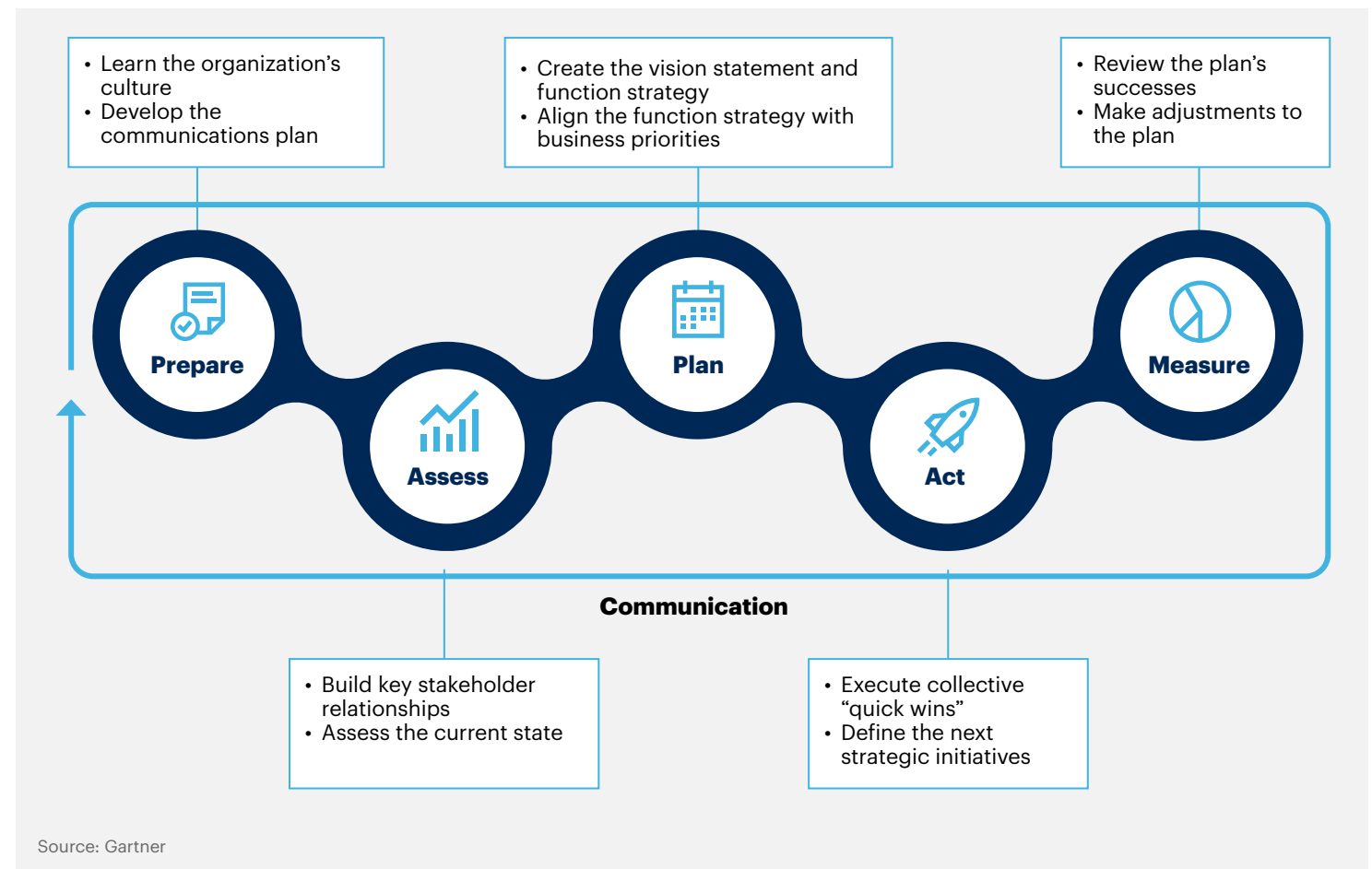
- Identify how customer service supports broader organizational objectives and plays a role in improving the overarching customer experience. Learn current performance and perception of recent successes and challenges before meeting with stakeholders and partners from other business units.
- Audit the current technology stack to understand how systems work together and if your team members, from direct reports to frontline reps, can access the right tools and information to succeed.
- Prioritize building relationships in your organization through individual meetings, listening tours and town halls. Identify and meet with key personnel across all departments to achieve quick wins.
- Maximize your chances for success by creating detailed activity plans for the first few months, focusing on data analysis, observing and learning. Communicate with your team and organization with transparency and visibility into why decisions are made.

## Introduction

The first 90 to 100 days allow you to analyze and understand the current state of the organization's opportunities to plan and share your vision of your organization's future. This phase is also your opportunity to establish your communication style. Whether you are new to the organization or promoted from within, the first 100 days constitute an expected "honeymoon" or transition period. Use this period to formulate a course of action and understand the organization and the service function to spot opportunities, make connections and communicate.

Your first 100 days are broken into five phases (see Figure 1). Each phase includes critical target outcomes, actions and resources, and some optional ideas to consider as time and resources allow. Be sure to include specific steps for effective communication during each of the five phases.

Figure 1: The Transitioning Service Leader's Roadmap



Look to accomplish the following in your first 100 days:

- Develop a relationship with your direct manager. Understand their key concerns and goals for the customer service and support organization and learn the overall company goals. Ensuring customer service and support initiatives support the overall company's keys to success is essential. Discuss with your leader the specific metrics you will use to track progress and success.
- Order your new company's product online, contact sales and support via various touchpoints, and document your experience. If you're a B2C leader, attempting to experience your customer's journey is essential. This phase is a good time for you to play secret shopper. Listen to calls from your contact center and visit your key customers to dive into the current state of the service function from the customer's POV. Observing and visiting helps you understand your external and internal "pain points" and wish lists
- Set up a time to observe your customer success manager interactions. Ask to meet with customers, introduce yourself and get direct feedback from them as soon as possible. If you're a B2B leader, partner with your sales executive peer and plan to attend a sales call early on.
- Plan your meet-and-greet strategy for your team members before your arrival. Whether fully remote, in-office or hybrid, meeting your team and providing access to hear your message and interact with you is crucial. Offering special care for your fully remote workers is recommended to ensure they feel you're engaging them. Be sure to plan skip-level meetings before you arrive so your staff will have time to think about questions to ask during your interactions.
- Build a network of your leadership peers. Your peers will contribute to, influence and support your cross-functional service initiatives. Forge solid relationships with all key stakeholders such as sales, marketing, product, finance, legal, human resources and information technology. Plan to visit locations where your critical stakeholders and collaborators are.
- Review the voice of the customer (VoC), employee feedback and operations data as soon as possible. Assess relationships between customer/employee perception and key business outcomes such as sales, retention, referrals and administrative expenses. Ensure you have access to key reporting metrics.
- Learn the goals for both your department and your direct reports. Are your direct reports' goals realistic, measurable and time-bound? Do the departmental goals tie to the organization's overall key initiatives?



## Prepare

### Document Your Perception of the Organization From a Customer Perspective

Before starting, document your perception of the organization as a customer/client. Your clear-eyed view of an organization, based on your personal experience, will only be available for a short time. Write down what you learned about the company via research, interactions with customer support, and reviewing the website. Also, evaluate things like Glassdoor or other company review sites, and the information shared with you throughout the interview process. Coming into this phase, clearly document your perception, whether accurate or not.

### Target Outcomes

- First impressions are made. Connecting with key people within and outside your organization will enable you to make initial gauges of people, as well as their perception of you as a leader.
- Your company and organizational perceptions are formed. You can now form your thoughts and perceptions on the company, product and initiatives that your staff will support. Gather and understand information about your organization's strategy and the industry.
- Know how you will be judged. Think about how your role and expectations will be determined. What are the roadblocks to achievement or pain points, and what key skills/experience do you bring to help the organization be more successful?

### Barriers to Success and Actionable Solutions

In this initial phase, your focus should be on the industry, the organization, your role within it, and the expectations of your management. Laying the groundwork for a successful 100 days will require action before and after you start.

**Before Day 1: Plan to establish the culture as soon as possible.** As the leader, you will be able to change the culture and impact the lives of the people in your organization. Review the company's Glassdoor and Indeed pages to gather employee feedback before joining the organization. If the organization has an employee feedback survey, review any data or comments from employees to gauge the internal satisfaction of the department.

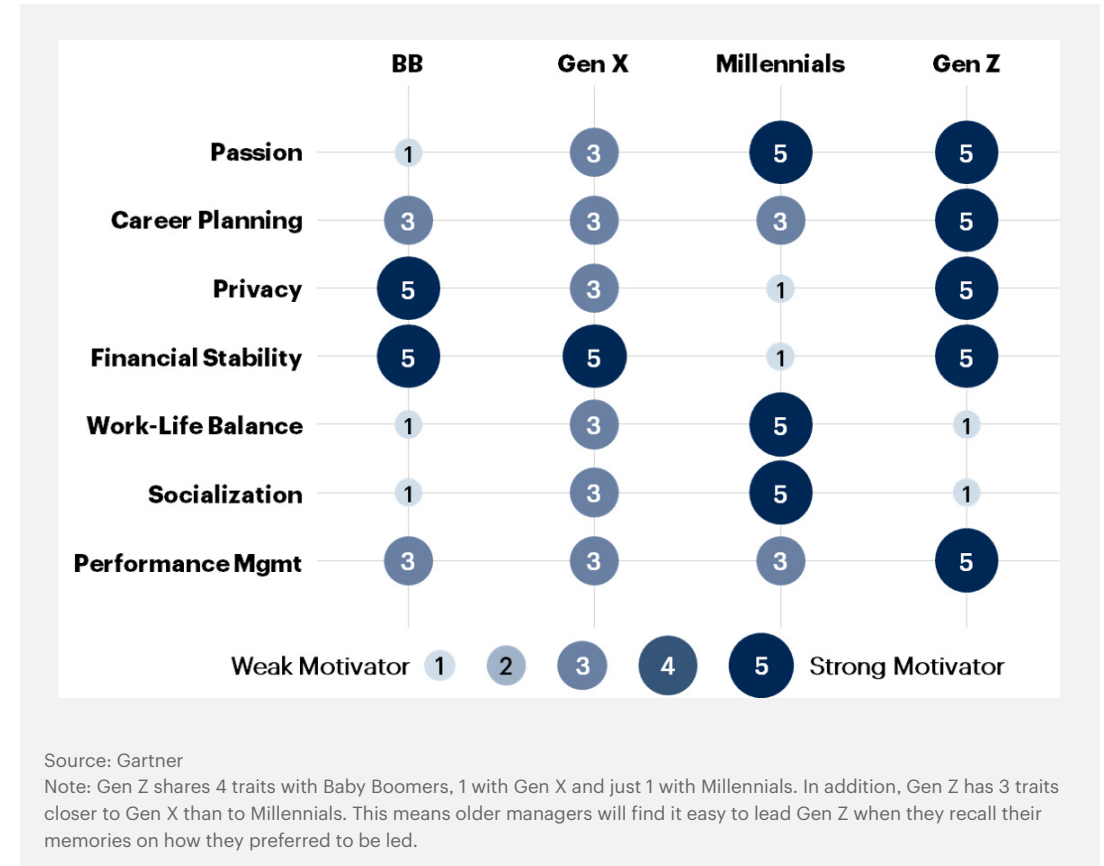
## Develop Your Initial Communication Plan

### Before Day 1

Plan your initial communication to your team and overall organization:

- Write an introduction. Prepare introductory communication about yourself, your background and your initial thoughts on joining the organization, and share with your new leader for feedback. Make this content formal and emotional, and keep it short and succinct. For example, try a 100-word short bio, along with some personal information about your key priorities in life and work. Include the biggest successes in your career that align with your new department, and express excitement.
- Think about the message you are crafting and how it will likely be received by members of your staff. Although not all individuals in a generational cohort will show the same characteristics or share the same preferences, statistically there are common values and a common behavioral pattern in accordance with the context of that generation (see Figure 2).
- Embrace stakeholder discussions. Prepare a list of no more than five specific and open-ended questions that will ensure the early stakeholder conversations yield insights beyond the polite meet-and-greets.
- Schedule staff interactions. Prepare a list of similar questions for your first meeting with your staff. Ask them about their key work challenges and constraints, and their perception and satisfaction with their team and organization. It's essential to understand the obstacles in their way to deliver an exceptional customer and employee experience.

Figure 2: Preferences Comparison Among Generations



## On Day 1

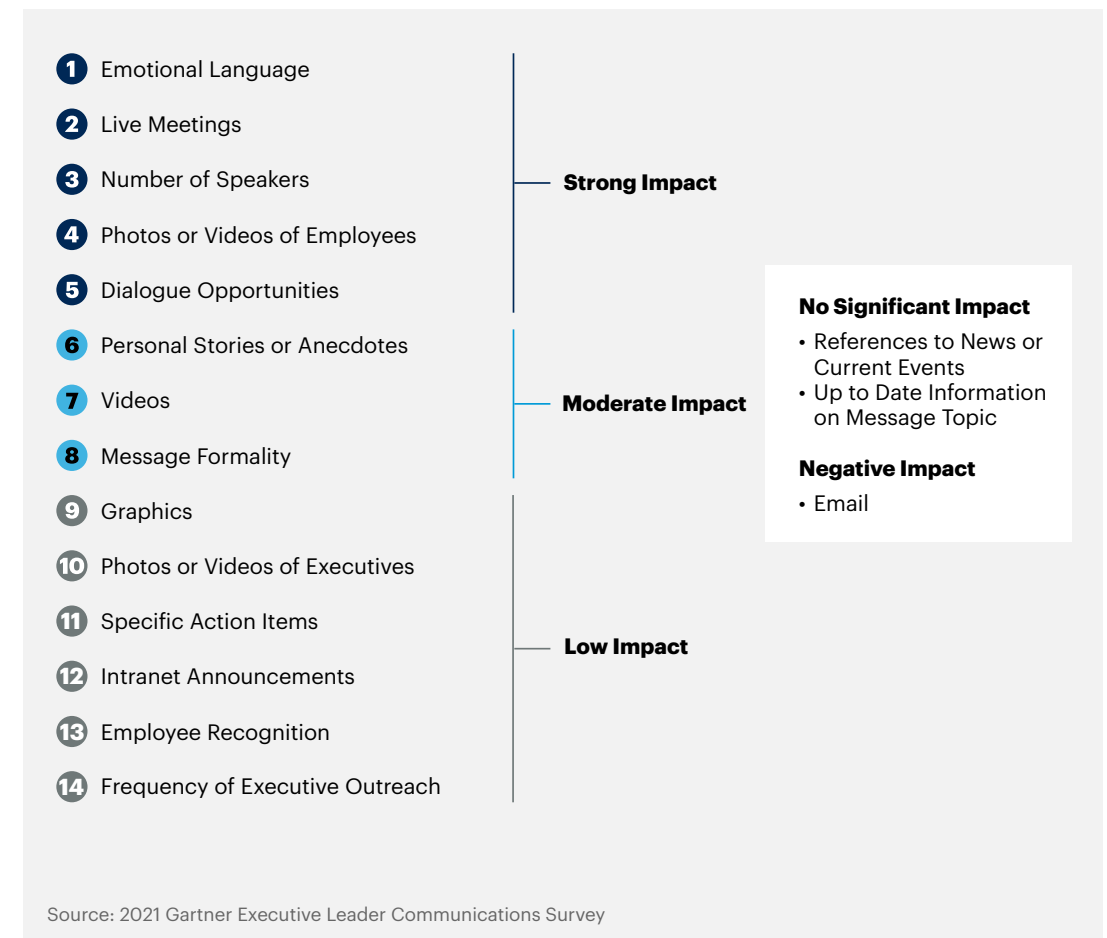
Since your first day on the job is all about listening and communicating, we include actions and communications tasks here.

**Meet-and-Greet:** Call a meeting for everyone in your direct report team as soon as possible after onboarding. The goal of this meeting is to be visible and approachable.

During the meet and greet:

- Deliver the introductory message you drafted in advance. State when you will report to the team with updates on your progress.
- Let the people attending the meeting introduce themselves and ask whatever questions are on their minds.
- Take notes about each person that will help you start conversations later.
- Be mindful of any apparent biases. Identify political or social issues that may remain from your predecessors.
- Be careful not to come on too strong and appear as a threat or hurdle; first impressions are lasting.
- Understand your direct reports' concerns, priorities and career aspirations. Which ones understand and can describe the bigger picture? Which ones seem siloed in their views? Where do they need immediate help?
- Emphasize that you look forward to learning from your team and working together.
- Understand that emotional language strongly impacts positive employee responses (see Figure 3).

Figure 3: The Characteristics That Matter



**Be a good listener:** Let as many of the people attending the meeting introduce themselves in their own way and ask whatever questions are on their minds. Prompt all employees to discuss how the organization's mission and vision statements elicit a sense of individual purpose in each of them to contribute to the overall success of the team and organization.

Focus on learning your direct reports' concerns, priorities and career aspirations: One or more of your current team members likely interviewed for the role you accepted. Identify which employees may be at risk of leaving after not being selected. It's critical to win their trust and to help them understand your leadership approach. They will be vital to help you develop your strategy and team. It's also essential to identify those who seem siloed in their views and where each employee may need immediate help.

**Record your introduction:** Distribute the introductory remarks to the broader service organization. If possible, post your introduction on the company intranet.

**Regroup with your manager:** Wrap up the preparation phase with a meeting that covers the initial key challenges and opportunities from your point of view, your preliminary strategic vision and your communications schedule for the future between the two of you.

## Assess

### Evaluate People, Processes and Technologies

During this phase, build on the insight from the prepare phase. Begin applying this insight to the capabilities of the customer service and support operations department and the broader support function to develop a functional understanding of key people, processes and technologies.

#### Target Outcomes

- Objective, peer-based performance standards to evaluate maturity and effectiveness of your customer service and support function
- Two potential quick wins that are top challenges holding back customer service and support operations
- Early indications of what's working and what isn't from as many different perspectives as possible
- An understanding of your organization's leadership and whether their skill sets match the role they are serving

## Barriers to Success and Actionable Solutions

- Create an inventory of the internal and external reports/resources you manage and interact with throughout the organization. Review the existing customer service strategy, vision, architecture and digital roadmap. Understand how this links into the service strategy and the corporate customer experience strategy. Assess how much organizational value service is providing or supporting overall CX within the organization.
- Perform a high-level, current-state assessment. Identify, at a macro level, which elements of the company's service organization are functioning well and which you must overhaul. You can measure performance in various ways:
  - You, your team and stakeholders should complete the Gartner Customer Service and Support Score. This measures performance across five objectives and 17 discrete functional activities that comprehensively represent the scope of activities for the typical customer service and support function. Review the organization's job descriptions and hiring profiles to target the right skills for currently filled and open roles.
  - Does your team have the right leadership capability, experience and skills to deliver your goals?
  - Perform the Customer Service Operations and Digital Efficiency Benchmark to compare your organization's operational efficiency, channel performance and case management metrics to those of your peers.
  - Perform the Self-Service Experience Assessment to identify ways to optimize your organization's self-service capabilities based on key drivers of performance. This assessment can help you understand opportunities to improve CX and drive self-service success.
- Review performance metrics such as cost per call, cost per contact, cost per resolution, customer's lifetime value, retention rates and membership trends.
- Assess internal reports like attrition (voluntary/involuntary), exit surveys, HR's "average time to hire" open/key positions, and employee satisfaction surveys (by director, manager, and team leader).
- Evaluate your organization's performance measurements and ask yourself if they are contributing to growing the business through cross-selling/upselling, growing/retaining business by driving increased customer loyalty, and reducing cost.
- Evaluate how well other business functions work and communicate with your department. It's crucial that the entire organization stays abreast of any customer issues and quickly addresses any client "pain points."
- Attend various meetings with your management team and stakeholders. Attending meetings with multiple departments in your service organization, contributing and asking questions can demonstrate to your team that you are interested in their role. It also allows you to observe the management styles of your team leaders and show that you will be someone who will help them develop ideas and solve issues.
- Understand the planned operational budget for the remainder of the fiscal year. You likely will be able to stay within the set budget for the current year, but based on any changes in direction there may be an opportunity to work with your finance team to shift funds to higher ROI items. Consider corporate assumptions going into the new year's budget. Create a business case/ROI if you will be requesting additional funding.

## Communications

- Ask neutral questions to avoid biased answers. Operations team members have very passionate opinions about how the company can better serve its customers. However, this passion can sometimes influence another stakeholder's observations and opinions. The temptation to repeat these answers as fact should always be resisted until proven, but never more so than during the first 100 days when you know little about people, workflows, processes and technologies. Explain that you want to listen to them, encouraging open discussions on any business topic.
- Shadow your center and observe random live calls, chats, social media and written responses to inquiries. Review individual interactions across channels with customers. It's best to ask for access to the call monitoring or system of record to pull random interactions versus being delivered hand-picked interactions. Ensure you set this up as an opportunity to learn, not something to judge the individuals on. It's essential to understand the reality of interactions to start improving.
- Proactively reach out to key stakeholders. Understand how key stakeholders will influence your ability to succeed in your new role. In addition to listening and asking questions, use these introductory meetings to gather key information about the stakeholders who will affect your success in the new role.
  - Schedule one-on-one meetings with senior leaders in your organization.
  - Schedule one-on-one meetings to discuss roles and responsibilities with key stakeholders and cross-functional business partners, including finance, sales, marketing, IT, HR, legal and product.
- Communicate the results of the Gartner Service and Support Assessment Score to your organization. It's important to highlight the results and any variances in perception of capabilities on your team.
- Assess talent. Who can you rely on the most among their direct reports? Who can you trust? It's important to assess your team through the conversations to understand who are your thought leaders/top performers.
- Regroup with your manager. Wrap up the assess phase in a meeting with your manager that covers the discussions with your stakeholders and staff. Share your evaluation of your organization's performance and leadership team capabilities, and gain their perspective on your assessment.



## Plan

### Align Function Strategy With Business Priorities

Until this point, you have prepared to assume your new role and assessed the overall dynamics of the organization. In the plan phase, it's time to use that research together to identify themes, priorities and opportunities as a strategic roadmap. The plan phase will align objectives, strategy, initiatives, recommendations, timelines, anticipated outcomes and metrics.

Based on all your research, identify those quick wins that can impact the members of your team and the business.

### Target Outcomes

- Understanding of the planned customer service and support operation budgets for the next quarter and the remainder of the year
- A strategic plan for how to meet your budget while improving the maturity levels of your functional activities from the customer service and support assessment
- A roadmap for projects deemed high importance and lower-than-desired maturity on the Gartner Service and Support Assessment you filled out earlier
- A firm understanding of the critical metrics and dashboards and how they help stakeholders achieve their critical goals
- An definition of analytics roadmap that focuses on supporting and demonstrating how success is defined

- A plan to modify the current VoC methods and measures if needed, ensuring they are delivering value
- Encouragement of changes to the quality assurance program if they don't map to delivering value

### Barriers to Success and Actionable Solutions

- Evaluate the organizational design of your departments. Use Gartner's Tool: Assessing Organizational Restructuring Needs to determine whether you should restructure, streamline, integrate, eliminate, outsource or relocate specific functions, tasks or people. Document your plans using Tool: Customer Service and Support Strategy on a Page.
- Choose two key issues to focus on over the next three months. Avoid being pulled into many reactive problems that others can handle; instead, focus on establishing yourself by working on a small number of value-added projects to get quick wins. These quick wins help to cement your credibility as a proactive leader. Use Gartner's Tool: Customer Service and Support Strategy on a Page to provide support leaders with guidance. This tool offers a fully customizable template for crafting and communicating an overview of the function's strategic plan and objectives in order to gain buy-in and support from leadership and their team.

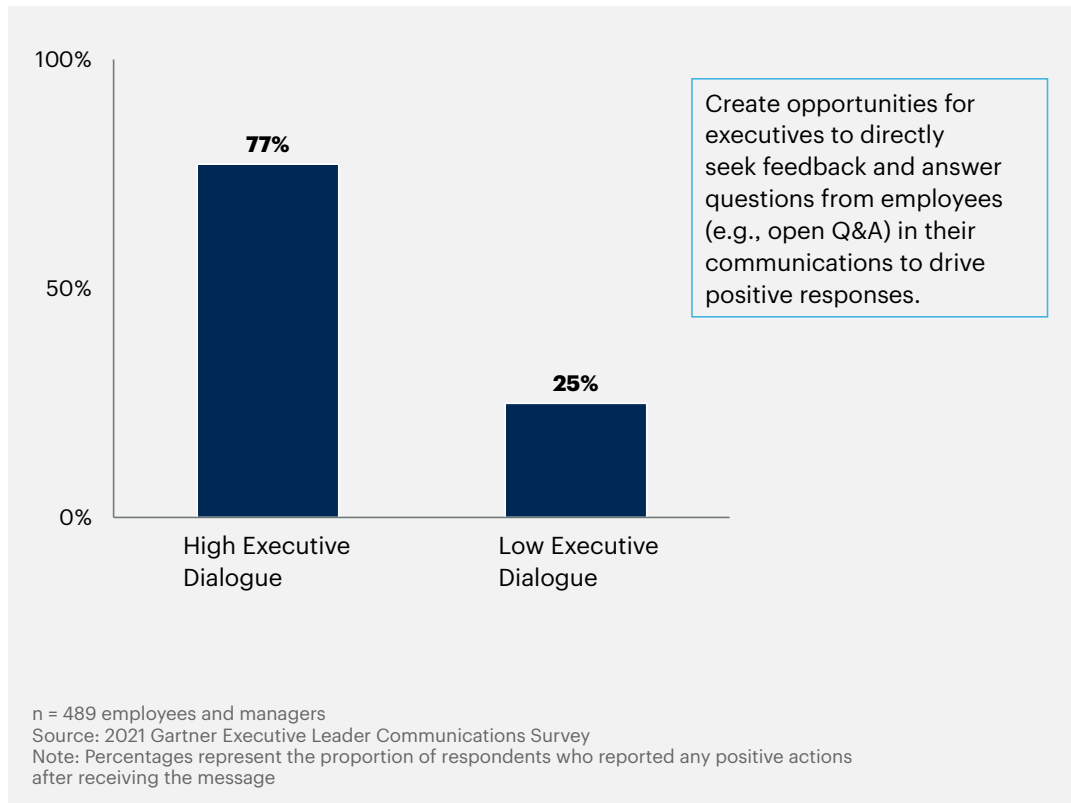
- Ensure your VOC programs are tracked to performance against business objectives. Customer service and support leaders must ensure their VoC program captures performance results for key business objectives. Ensure the current VoC program captures customer expectations and requirements. Review *It's Time to Reevaluate Your Customer Service and Support Metrics — Here's How* to ensure your metrics align with your CEOs functional and corporate objectives.
- Influence the direction of existing projects. Evaluate in-flight projects. Collaborate with your team to determine whether existing projects are necessary or if midcourse changes are advisable based on items deemed high importance and lower than desired maturity from taking the Customer Service and Support Score and Self-Service Experience Assessment in the assess phase.
- Get the team moving. Fully engage your team, including key high-potential talent, in the planning and execution of early initiatives. It is a great way to identify talent and skills, and you can convey the value of teamwork and collaboration. If this roadmap contains elements from feedback received, be sure to highlight them. The roadmap should have agreed-upon priorities and milestones that tie to top business initiatives. This should include the key issues you focus on over the next few months for your quick wins.

- Ensure your team has the right training and tools. Do your leaders have the data they need to lead their teams successfully? Review *How to Establish the Foundation of a Customer Service and Support Analytics Team*. In terms of people, are there potential members of the organization who may have been overlooked in the past that bring a significant amount of value? For technology enablement, plan any gaps in agent enablement by reviewing and planning against the 2023 Strategic Roadmap for the Connected Rep.

### **Communications**

- Schedule a few town hall meetings at your key locations with live video and chat options for questions. Update everyone on your progress on your two “quick wins,” in-flight projects, and current service levels. Celebrate the successes and identify opportunities with key steps to address and turn around performance where necessary.
- Continue focus group discussions with staff to promote high executive dialogue. Visibility in person and online meetings is critical. It's important to “pop in” to various meetings where your experience could add value, and it shows that you are interested and appreciate their contributions to the organization. Employees respond positively to high executive dialogue (see Figure 4).

Figure 4: Positive Responses by Level of Executive Dialogue



Regroup with your manager. A critical part of the plan phase is ensuring alignment with the manager on your plan based on your observations and planned goals. Having manager buy-in and agreement on the plan going forward (including measures of success and timelines) is important at this stage. Wrap up the plan phase by meeting with your manager to cover the items you plan to implement to achieve the organization's goal. Share any challenges you've faced with your team members or with leaders across the organization, and ask for guidance or support.



## Apply What You Have Learned

In this phase, your plan will be put into action. To succeed in the act phase, leverage the information you've gained and implement a plan. Communication between all relevant stakeholders is essential in establishing formalized feedback loops for upstream and downstream communication, regular reporting, and dashboard development to monitor progress and unofficial backchannels to resolve issues when necessary quickly. Watch success measures closely to ensure you enable your team through training and resources and remove obstacles to executing. While successes must be shared across your organization, use this as an opportunity to share that praise with your team members who helped execute your strategy.

### Target Outcomes

- Substantial progression with the two key issues that you've identified for quick wins — These should be a priority and completed within your first 90 days of being in the role
- Announcement and implementation of any changes to customer service and support operations' structure to bring the department in line with the company's overall strategic goals
- Close working relationships with your team and other executive team members
- Beginning the project roadmap to improve low-maturity organizational capabilities that are highly important

## Barriers to Success and Actionable Solutions

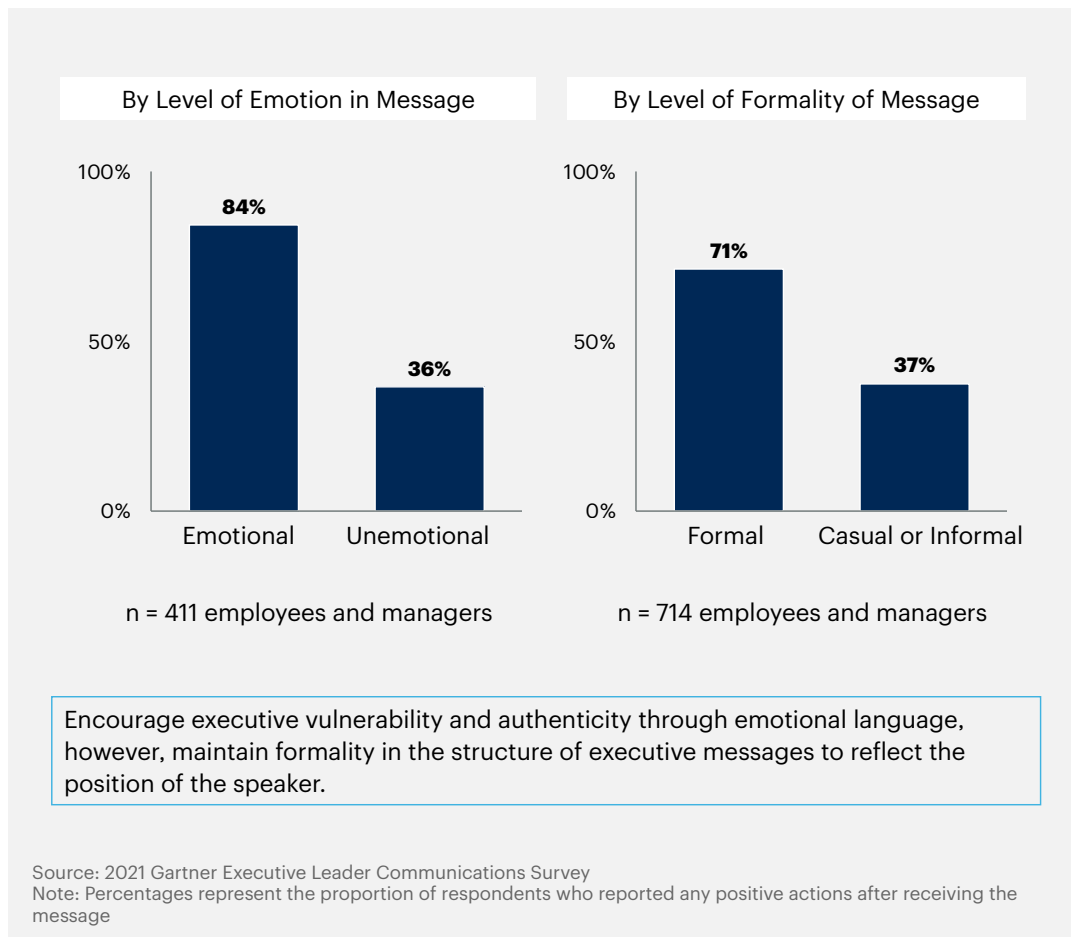
- Focus on critical goals that will drive your organization's success. Ensure your employees know what those goals are now and going forward. Modify the project roadmap and consider stopping projects altogether if they don't support business objectives.
- Operationalize quick wins. To demonstrate your ability to act on the areas identified for improvement and garner goodwill, initiate short projects that address stakeholder pain points. Examples include updates to reporting dashboards or reporting frequency, updating outdated processes and procedures and creating an inventory of Customer Service & Support customer systems for evaluation and immediate potential enhancement.
- Refine your team. This is your opportunity to recognize strengths, capitalize on motivational factors and make changes to the team structure, if necessary. If you uncovered capability gaps or talent misalignments in the assess or plan stages, now is the time to correct them. Propose possible changes to your leader to get feedback and ensure they are supportive of any necessary organizational changes. Depending on the significance of the change, you may want to preview the adjustments with other executive leaders outside of your organization as well.

- Identify and acknowledge key performance evaluation dates for all members of the team. Attempt to coordinate any changes with individual performance management around those dates so as not impact individual performance reviews right away, if possible. Changing individual goals at the staff level creates confusion around job requirements, training and tabulation, and can create frustration with the staff. Identify leaders at risk. By the beginning of the act phase, you will have a better idea of where individuals are on performance and attrition risk continuums. For individuals you deem critical to your cause, spend extra time reassuring them where needed.
- Identify required actions from the maturity assessment. This requires a twofold approach:
  - Identify any short-term (within three to six months) changes and schedule these into your immediate work plans. Look for leverage points where more minor changes can yield more significant results. Your goal should be to get momentum, so you must build credibility quickly.
  - Identify longer-term changes and integrate them into strategic plans with a 12-to 18-month time frame — the remainder of the current year plus the following year.

### **Communications**

- Use change story-telling. Communications often fail to generate buy-in for change because internal stakeholders lack a clear understanding of the reasons for change, leading to resistance, use the Gartner tool: Build Stakeholder Buy-in Through Change Storytelling to ensure change communication success.
- Communicate changes to projects to the team. Ensure to communicate the reasoning behind any project direction changes. Using the assessment data of stakeholders and team members' important performance requirements will help the team understand why changes were made.
- Maintain professionalism while communicating. Executives who try to come off too edgy may be off-putting to their intended audience. Many startup and tech-era leaders attempt to come across as edgy by using colorful language. Our research in Figure 5 shows that showing emotion is received well, but remaining formal will get you the best results.

Figure 5: Response to Emotion and Formality



- Foster a culture of high decision-making visibility and candid feedback. Encourage your team to provide honest feedback on people, process, and technology, but require your leaders to suggest solutions to problems.
- Be open to and encourage experimentation. In an organization in which failures and setbacks are met with anger or contempt, the staff will hide problems until they are overwhelming. If the organization has an existing culture of blame, be vigilant in countering that culture. Also, make sure you dig deeply enough to find whatever issues are concealed.
- Use decision-making visibility. The team needs to understand why decisions were made and what the organization is trying to achieve. Being transparent reinforces your ability to collaborate, communicate, and be open to other opinions and advice. Decision-making visibility is defined as:
  - Helping me understand the assumptions that led to decisions
  - Helping me make sense of the external market context
  - Helping me understand the strategic goals of the broader organization
  - Helping me understand how my decisions connect to my company's success

- Communicate status often — not just with your manager but with the broader team. Do not count on your team's accomplishments to filter through the organization independently. Instead, trumpet them both via email updates and in all-hands meetings when you can. Leverage your manager to make sure you get these opportunities. When you celebrate the team's successes, people in the organization see you as a supportive leader, which will help you attract internal talent. It's still essential to regroup with and inform your manager of progress in the act phase. Be sure to communicate your team's success and opportunities going forward clearly.
- Keep closed-loop feedback mechanisms constantly flowing. Now is not the time to back off on contact with customers and internal stakeholders. Those loops serve two purposes. First, they help you validate the team's work as you progress so that you spend only a short time on the wrong path before realizing it. Second, they help you iterate the plan and bring the mid- and long-term items into tighter focus as they approach the present. Ensure that feedback is sent to you or through defined channels in your organization and that the appropriate review to supply a response.



### **Build Reporting Framework and Monitor Progress**

The measure phase is your chance to start providing evidence of your impact. This phase overlaps significantly with the act phase. The overlap offers the opportunity to see results, and for feedback from stakeholders so that the act phase's activities and deliverables can be adjusted, ensuring they produce the desired results.

#### **Target Outcomes**

- Creating a foundation of an effective reporting framework and compelling dashboards shared across the organization
- Formation of, or support from, the data and analytics (D&A) team in critical areas
- Closing of the loop with both customers and other stakeholders on what you've accomplished, including the achievement of your two focused goals
- Reporting cadence regularity to show progress against reporting and organizational goals
- Evaluating and tracking of your organization's impact on broader organizational initiatives leading to positive progress on customer/employee satisfaction, service-level goals, analytics, cost, and process optimization
- Continuous refining of short-/longer-term strategic goals for the operation

## Barriers to Success and Actionable Solutions

- Measure both individual and team performance. It's important to measure performance objectively against tangible results and feed that into a process of continuous improvement. No person, team or effort is perfect. Conduct retrospectives on everything you do and integrate the improvement ideas that come from them into whatever process already exists. For this to be effective, continue avoiding assignment of blame, as you did in the act phase. Focus on mistakes and behavior, the problems with them, and on improving them rather than on the person. Ensure the data you share with the team members helps them achieve their goals and the organization's goals overall. Ensure that how employees are measured and incentivized aligns with organizational goals.
- Provide value to other departments. Ensure that the information you find from your effective reporting is shared across the organization in an easily understood and actionable format. The development of a Data & Analytics team within the service organization may be needed to ensure they understand call center operations and relate information to the organization. It is vital that leaders understand how to Unlock the Value of Service Interactions With Data and Analytics to learn from the past, predict the future and shape the present.
- Teach the team to prioritize customers and their experiences first. Too many companies allow their organization and history to drive architecture and that architecture to drive experience. Instead, reverse this flow by using design thinking and empathy for the complete customer experience to guide the work.
- Make sure to have positive suggestions for change and not just complaints. Always model the change you want to see well before advocating for it. Hypocritical change efforts always flounder. When changes are made, give proper credit to those who provided the feedback.
- Adjust your plans using what you've learned from being data-driven. After one-quarter of execution, you've undoubtedly learned tremendously about the customer, the product and the organization. Use this knowledge to revise your plans for the better and strive for continuous improvement. If this requires modification of your key performance metrics, negotiate with your manager. If changes are needed, as always, do this revision openly and transparently.

## Communications

- Monitor and update your progress against key goals. Regular progress reports should be brief and focus on only the information and metrics you need to discuss with business leaders and financial management. Focus reports on telling business leaders how they're doing, not what they've done. Use the data captured by the VoC program to help determine whether the service function's strategies for aligning their VoC objectives with business objectives are improving the business outcomes.
- Fix Ineffective Service and Support Management Dashboards. Management dashboards often present partial views of service performance and fail to drive action. Customer service and support leaders must overhaul their dashboards to present a single, actionable view of performance, leveraging cross-functional data. They must subsequently be treated as products.
- Advertise your team's successes. As in the act phase, continue broadcasting your team's successes to your manager, peers, team and the broader organization and how these successes tie to the organization's key initiatives.
- Continue working closely regularly with customers and internal stakeholders. The work of knowing what to improve is never done. Constantly look for ways to improve your data gathering from the customer and your synchronization with the rest of the organization. Tight, rapid feedback loops are the key to outmaneuvering your competition.
- Regroup with your manager. The measure phase lets you show the difference in plan and results and communicate potential deviations to your manager for feedback and support.

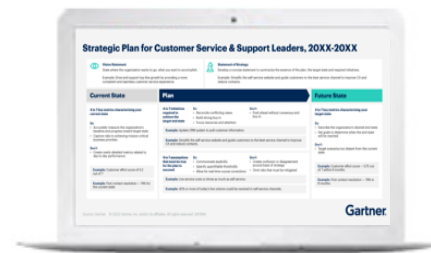
# How Gartner is helping customer service and support leaders

As customer service and support leaders transition into a new role, they can rely on Gartner research, expert guidance, peer best practices, templates and benchmarks to help them navigate their role and secure early wins.

Explore illustrative support you receive as a Gartner client to **excel in your new customer service role:**



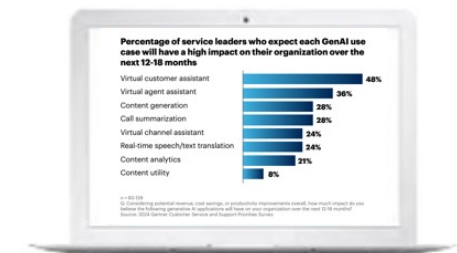
Compare your function's maturity to peers' and identify areas of improvement with the [Customer Service & Support Score](#).



Build a better customer service strategy for your function with our [Customer Service Strategic Planning Template](#).



Stay ahead of major customer service trends with the [Gartner Customer Service Leadership Vision](#).



Discover what your peers are prioritizing this year with [Gartner Customer Service Top Priorities](#).

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