

Building a Customer Service Roadmap



A time-phased, prioritized plan that sequences service strategy into initiatives, governance decisions, and capability investments.



Scope spans people, process, technology, data, channels, and governance over 12–36 months.



Strategy states intent; the roadmap sequences the turns; the backlog holds unsequenced work.



Named owners, funded milestones, and executive-reportable outcomes at every stage.



Common failure modes: initiative sprawl, no owner, no funding link, maps without operating-model footprints.



Deliverable: a one-page roadmap skeleton naming two to four priority journeys.



Why 2026 Demands a Different Kind of Roadmap



- AI is mainstream, but only ~10% reach mature deployment at scale



- Voice is rising, not sunseting: call volume up 16.1% year on year



- IVR time-to-queue fell 54% as AI and CRM-native routing replaced menu trees



- Consumers give virtual agents three attempts; 47% switch brands after two to three bad interactions



- The real blocker is data readiness, not ambition or budget



CLEARER INSIGHTS
STRONGER OPERATIONS
A BRIGHTER 2026

Diagnosing the Current State: Baseline Before Ambition

A clear view of today enables a focused and achievable tomorrow.



Operational KPIs

- Measure volume and mix, channel mix, AHT, FCR, backlog, cost per contact



Customer and Agent Signals

- Pair operational data with voice of customer and voice of agent signals



Technology and Data

- Inventory tech and data: CRM, CCaaS, knowledge, WFM, analytics, integrations



Organizational Readiness

- Assess readiness: skills, spans of control, incentives, change history



Output

- Output: a named-strengths, named-gaps picture that feeds the roadmap



Benchmark against your true industry peer group,
not a cross-industry average

Benchmarking Service Performance Against Real 2026 Standards



Cross-industry medians:

CSAT ~89%, NPS ~62, FCR ~80%,
AHT ~7 min, cost/contact ~\$6



Industry spread:

insurance highest at ~\$11.00;
travel and hospitality lowest at ~\$3.00



AHT is context-dependent:

a 12-minute full resolution beats
a 5-minute callback



Read KPIs in groups:

low FCR plus high AHT and low CSAT
signals complexity



**Stable year-over-year KPIs can mask
rising frustration** — treat flatness
as a warning



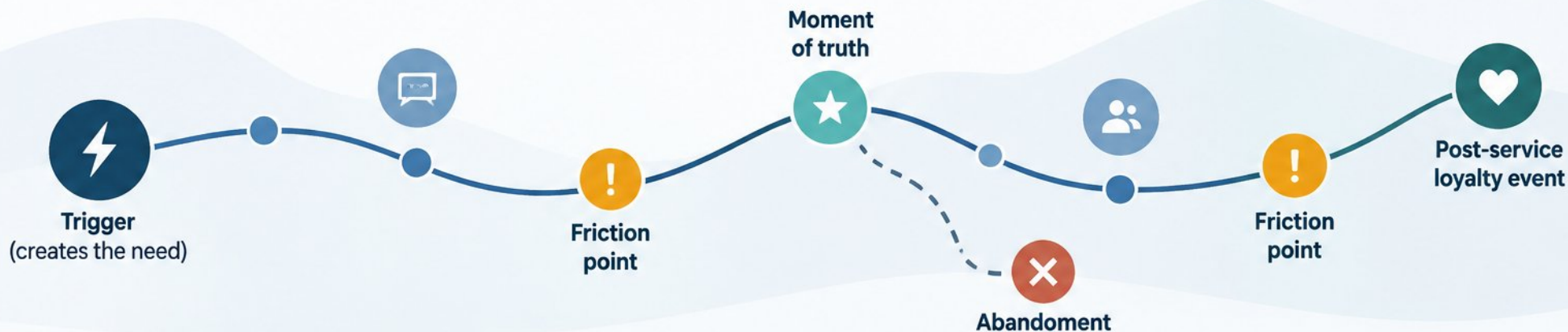
**Benchmarks only compare when
both sides define the KPI the same way**



INSIGHTS
FOR A STRONGER
TOMORROW

Mapping Journeys That Reveal Where Service Actually Breaks

FROM INSIGHT
TO A BETTER
TOMORROW



Scope from the trigger that creates the need to the post-service loyalty event



Select journeys by volume, customer pain, and business value — focus on moments of truth



Move from opinion-led to data-driven mapping: channel volumes, VoC, speech and text analytics



Involve customers directly when designing new or large-scale journey changes



Overlay customer effort (CES) on the blueprint to expose internal process breakdowns



Output: current-state maps, ranked friction points, future-state design, sequenced roadmap with owners

From Journey Finding to Roadmap Initiative



Every friction point needs quantified impact, business cost, and a named owner



Rank ruthlessly: forty unranked opportunities equal zero real change



Attach volume, drop-off, handle time, and cost data to each stage



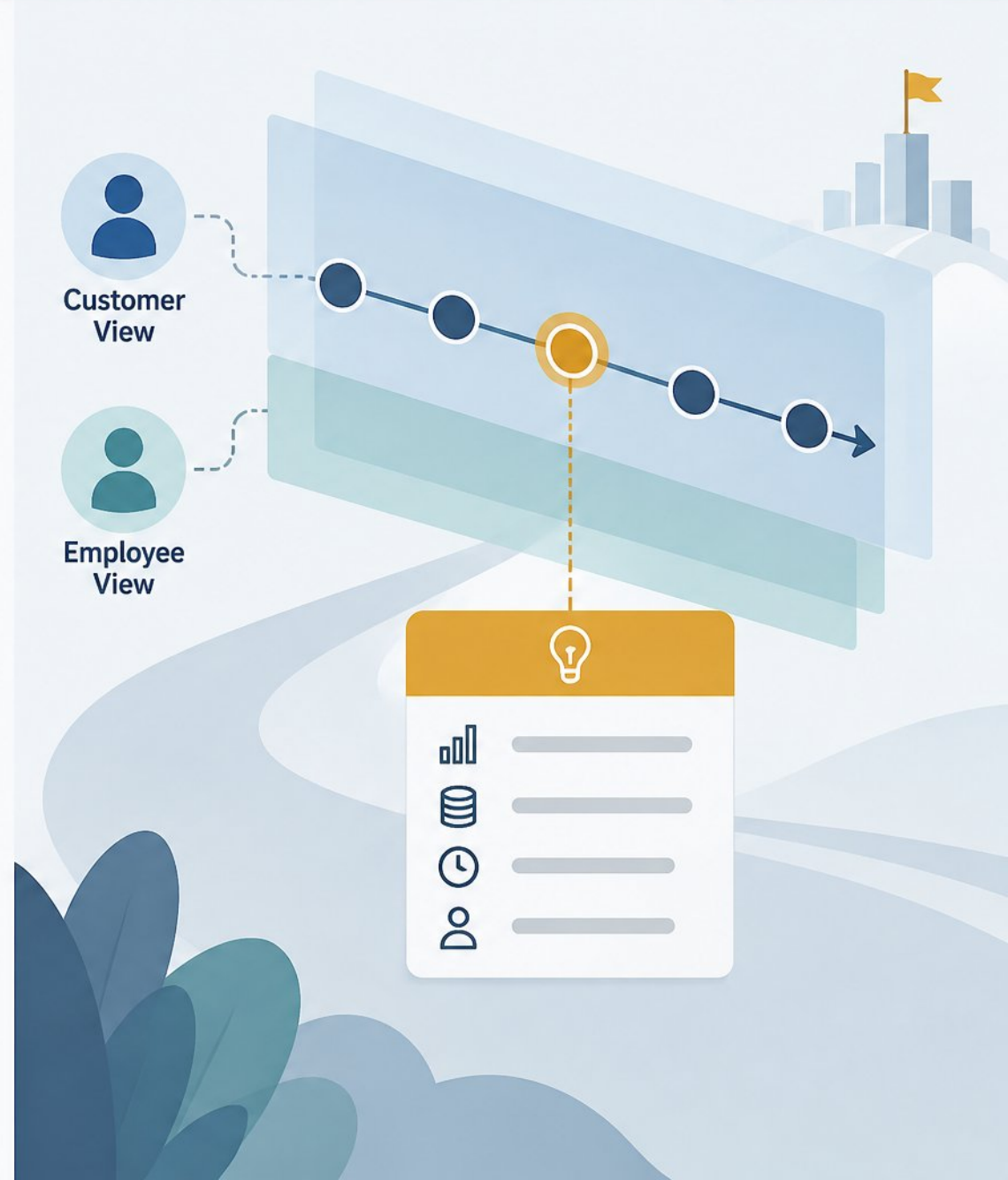
Include the employee view — same system seen from two sides



Use CES to find effort, service design to explain why



Keep maps alive; let VoC trigger reviews when things change



Defining Outcomes and Choosing Metrics That Matter



Outcome hierarchy: business, customer, and operational results



FCR is highest-leverage: 1% lift drives ~1% CSAT gain and lower cost



Commit to 4–6 KPIs: satisfaction, speed, resolution quality, efficiency



Set baselines from benchmarks or trend; separate leading from lagging



AHT is a diagnostic, never a target — always pair it with FCR



Same number must drive the same decision at every level

Prioritizing Initiatives: Impact, Effort, and Dependencies

A CLEARER PATH FROM IDEAS TO IMPACT

-  Match framework weight to decision weight: ICE for triage, RICE for cross-functional bets
-  $RICE = (Reach \times Impact \times Confidence) \div Effort$; have 3–5 people score independently, then average
-  Plot impact against effort: quick wins, strategic bets, fill-ins, deprioritize
-  Apply real constraints after scoring: dependencies, risk tolerance, parallel capacity, regulation
-  Map prerequisites explicitly — a blocked initiative stalls and consumes credibility
-  Fund freight-paying fixes and slow-return strategic bets differently

Impact vs. Effort

A SIMPLE LENS FOR TOUGH CHOICES



RICE Scoring

$$RICE = (Reach \times Impact \times Confidence) \div Effort$$

Have 3–5 people score independently, then average.

Dependencies Matter

MAP PREREQUISITES EXPLICITLY



A blocked initiative stalls and consumes credibility.

Technology and Data Enablers: Sequencing the Stack

THE RIGHT TECHNOLOGY, DATA, AND PEOPLE — A STRONGER CUSTOMER EXPERIENCE

AI AND
HUMAN EXPERTISE
TOGETHER

AI SERVICE LEVRS



agent assist



virtual agents



predictive support



automated QA

CORE CONTACT CENTRE PLATFORMS



CCaaS



CRM



knowledge



WFM



quality
management



analytics



UNIFIED CUSTOMER DATA



FOUNDATIONS



Platform roles: CCaaS, CRM, knowledge, WFM, quality management, analytics



Four AI levers: agent assist, virtual agents, predictive support, automated QA



Three in four organizations say AI lifted human agent performance



Unifying customer data across fragmented channels decides your ceiling



Build vs. buy: weigh integration lead times and agentic readiness



Sequence tech to enable process and people change — fix foundations first

PEOPLE + PROCESS + TECHNOLOGY + DATA = BETTER EXPERIENCES

People, Skills, and the Hybrid Operating Model

PEOPLE
A STRONGER
TOMORROW
TOGETHER



- Hybrid workforce = composition, not location: humans, AI agents, orchestration layer

- Roles shift to supervision, interpretation, configuration, optimization; 45% of teams updated job descriptions

- Forecast AI behaviour first, then model spillover: escalations, retry loops, rework

- Schedule explicit oversight time: AI reviews, drift checks, knowledge hygiene

- Coach from AI-scored QA across all conversations, not random sampling

Governance, Funding, and the Business Case



Name a roadmap owner with cross-functional authority



Appoint journey-level owners accountable for performance metrics



Business case: benefits, costs, payback, risk over 3–5 years



Low, base, high scenarios price uncertainty before the room argues



Tie initiatives to finance-recognized metrics: retention, cost per contact



Report outcomes, not activities: cost and revenue movement



Rollout, Adoption, and Change Management



Craft the story:
why change,
what changes,
how people
succeed



Measure three
layers: capability,
commitment, and
outcome metrics



Pilot in a
non-critical,
low-volume area
with pre-defined
success criteria



Prioritize least-
threatening
capabilities first:
summarization before
customer-facing
autonomy



Build peer
champions early;
managers own
the team
messaging



Diagnose
resistance: skills
gap, motivation
gap, or work
friction



Review Cadence: Keeping the Roadmap Alive



- Two rhythms: weekly operational review, quarterly strategic roadmap review
- Bring evidence, not opinion: metric movement, feedback, delivery status
- Every review produces at least one specific action — operational or strategic
- Accelerate, pause, pivot, or kill — and publish what you won't do
- Quarterly-only refresh drifts obsolete within six months; sustain a journey management function

Capstone: Assembling Your 12–36 Month Service Roadmap

FROM STRATEGY
TO MEANINGFUL
PROGRESS



One-page deliverable: vision, outcomes, 2–4 priority journeys, named owners



Sequence in three waves: quick wins, structural capability, differentiated experience



Test against four questions: evidence, dependency sequence, ownership, governance rhythm



Pressure-test the case: conservative, base, aggressive scenarios with explicit time lags



Define first 90 days: two journeys, one owner, reporting cadence, first improvement cycle



Set review trigger now: metrics, dates, and evidence to accelerate, adjust, or stop



A CLEARER PATH
TO GREATER IMPACT

PersonWise.

PersonWise • AI digital-human course platform



Scan the code or click anywhere to watch this course live, with voice Q&A

personwise.ai/t/063366d6/public