How to Review a Customer Service Project

- Reviews protect customer experience, control cost-to-serve, de-risk delivery, and capture lessons
- Four jobs: judge outcomes against commitments, diagnose causes, prioritize fixes, drive follow-through
- A project review differs from an operational audit and from a performance appraisal
- Cadence: gate reviews, mid-project health checks, and post-implementation reviews
- You leave with a defensible scorecard, a findings register, and an action plan



Scope, Boundaries, and Preconditions



- Define in-scope channels, teams, vendors, segments, and time period first
- Name the sponsor, review owner, and evidence owners explicitly
- Agree decision rights: who classifies criteria as met or inconclusive
- Lock the review schedule and reporting cadence with evidence owners

Failure mode: scope creep mid-review leaves findings impossible to close

From Vague Goals to Testable Success Criteria

Turn intent into clear, measurable criteria

Vague Goal

"Improve self-service customer satisfaction."

Testable Success Criterion

"raise self-service CSAT from 3.4 to 4.0 within 90 days of go-live"

- Numerator
- Denominator
- Exclusions
- Time window
- Owner
- Review frequency

- A usable criterion is specific, measurable, attributable, and time-bound
- Reframe intent: "raise self-service CSAT from 3.4 to 4.0 within 90 days of go-live"
- Balance measures: one primary metric, secondary metrics, and guardrails that must not worsen
- Document numerator, denominator, exclusions, time window, owner, and review frequency
- Lock criteria and definitions before performance is examined — no moving targets

Baseline First: Reconstructing the Promise

- Recover the approved charter, business case, and signed service-level commitments
- Separate contractual SLAs from internal targets and aspirational goals
- Confirm baselines and data definitions before judging any performance
- Record "no usable baseline" explicitly — don't invent one
- Adapt the scorecard to project type: new channel, migration, outsourcing
- Incomplete period or missing group = inconclusive, not success



Core Service KPIs and How to Read Them

MEASURE | UNDERSTAND | IMPROVE

FCR
First-Contact Resolution

FCR = first-contact resolutions ÷ total issues × 100

Benchmark (sanity check):
FCR 70–85%

CSAT
Customer Satisfaction

CSAT = ratings of 4–5 ÷ total responses × 100

Benchmark (sanity check):
CSAT 75–84% good, 85%+ world-class

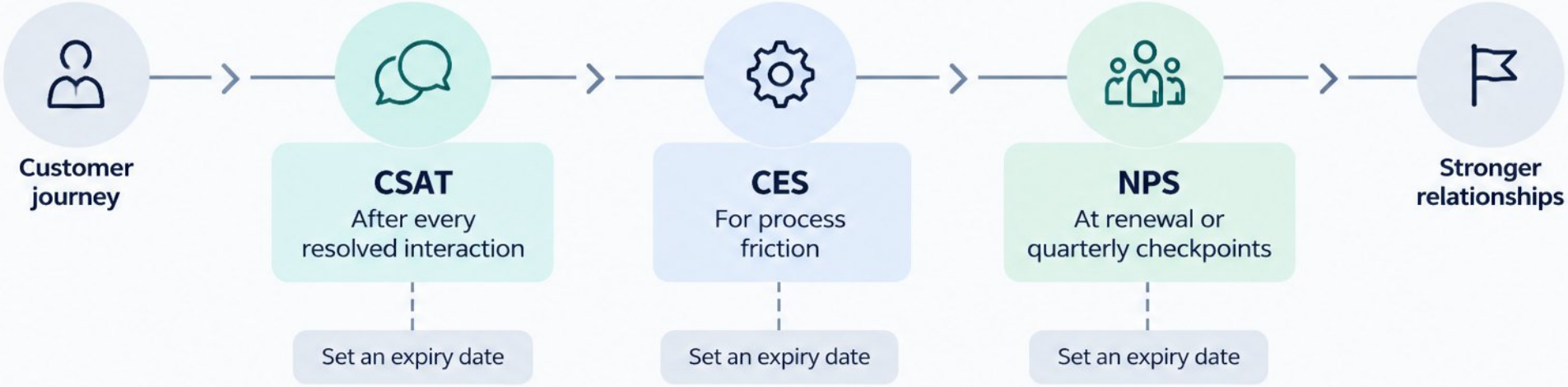
QA score
Quality Assurance

Benchmark (sanity check):
Use benchmarks as sanity checks, not pass marks

- FCR, CSAT, and QA score are core KPIs; rest is supporting evidence
- FCR = first-contact resolutions ÷ total issues × 100
- CSAT = ratings of 4–5 ÷ total responses × 100
- NPS = % promoters (9–10) – % detractors (0–6)
- Benchmarks are sanity checks: FCR 70–85%, CSAT 75–84% good, 85%+ world-class
- Agent-reported FCR runs higher than customer-confirmed — state which you report
- Show survey response rate and timing beside CSAT and NPS

Choosing the Right CX Metric for the Decision

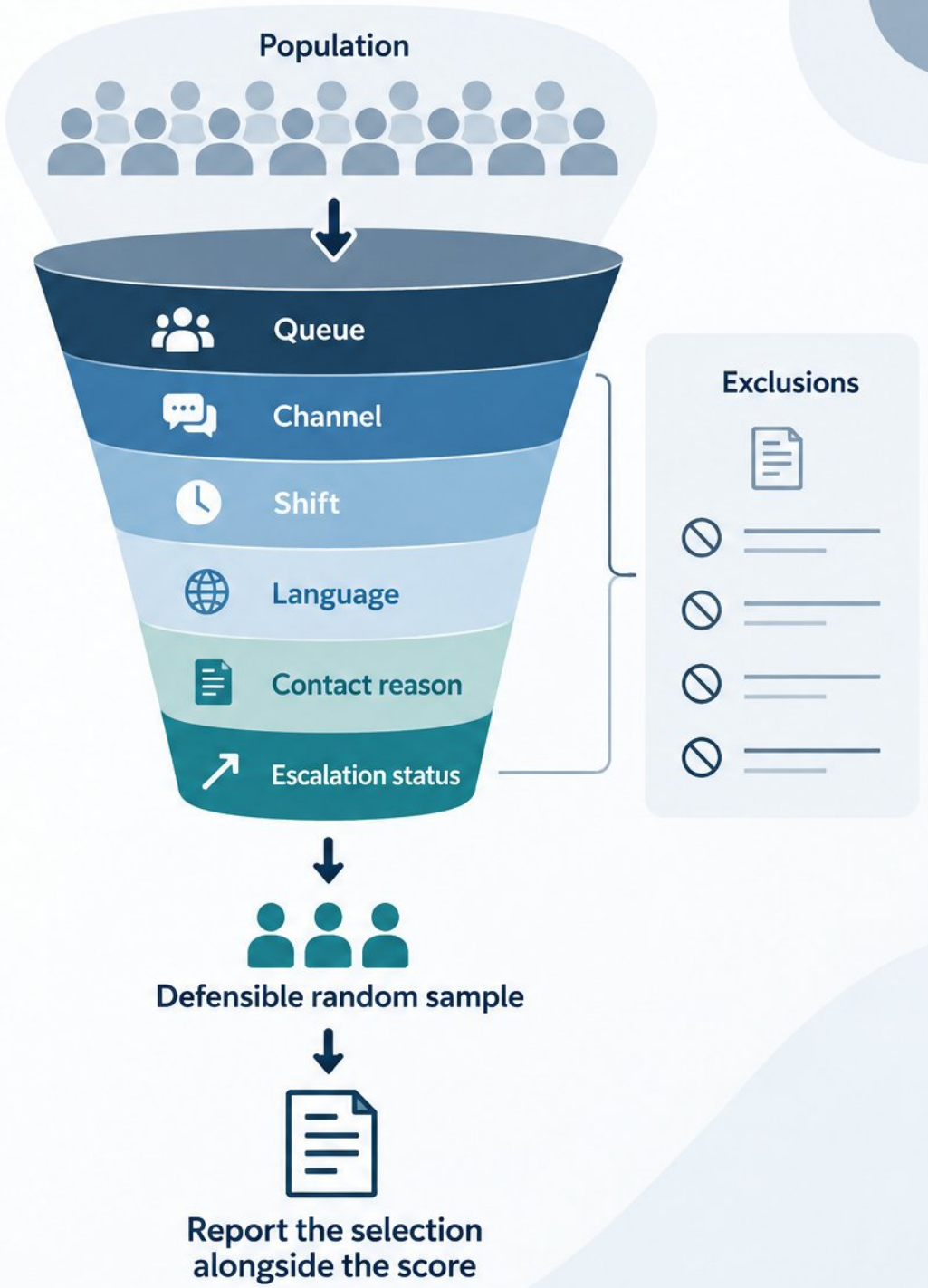
Different decisions call for different customer feedback. Use the right metric, at the right moment, for greater signal and impact.



1. Match metric to decision: CSAT for bounded interactions, CES for process friction, NPS for relationship loyalty
2. Ask CSAT after every resolved interaction; reserve NPS for renewal or quarterly checkpoints
3. CES is the sharper churn predictor in support and high-friction journeys
4. Give every transactional survey an expiry date; retire it once the touchpoint is fixed
5. Only NPS has broad cross-industry comparability — compare CSAT and CES to your own trend

Review Methods and Evidence: Sampling That Defends Itself

- Separate routine assurance sampling (for measurement) from targeted sampling (for investigation)
- Never blend the two into one score — it describes the selection, not the service
- Stratify by queue, channel, shift, language, contact reason, and escalation status
- Document eligibility and exclusions — the exclusions are the policy
- Report the selection alongside the score, not just the number

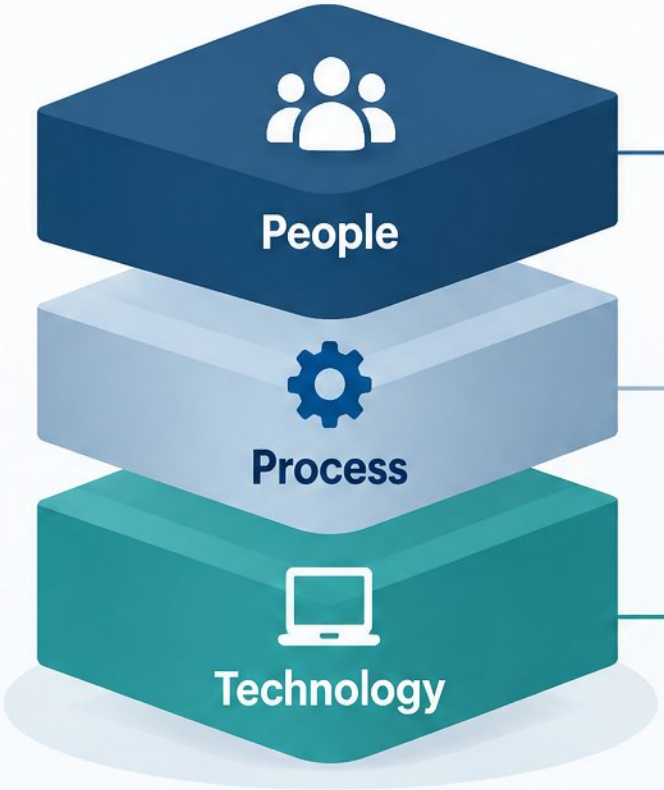


Evidence Collection and Root-Cause Analysis

- Combine dashboards, ticket data, and cost reports with call listening and interviews
- Use risk-weighted and CSAT-anchored sampling to find where things actually go wrong
- Apply five whys, fishbone, Pareto, and journey mapping for root-cause analysis
- Tag defects by cause: person, policy, system, knowledge, or handoff
- Calibrate reviewers on shared cases before findings judge anyone



Operating Model Review: People, Process, and Technology



People: staffing to forecast, skills coverage, training, attrition, coaching effectiveness, engagement

Process: workflow efficiency, handoffs, escalation paths, knowledge quality, defect and rework rates

Technology: CRM/ticketing adoption, automation performance, bot containment and escalation, availability

Benchmarks as context, not targets:

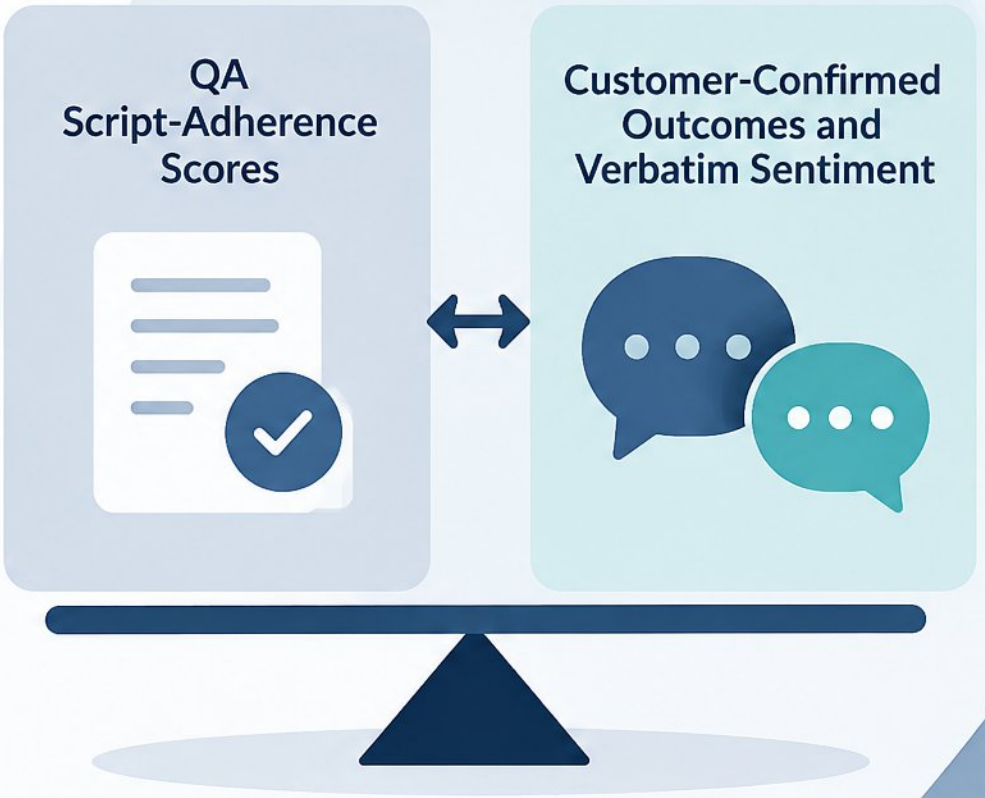
adherence 85–92%, voice occupancy 75–85%, shrinkage 30–35%

Check operating-model changes against original design; review vendor scorecards where outsourced

Evidence → Judge → Fix → Follow-up

Customer Outcomes and Quality of Experience

- Read CX and operational metrics together: CSAT, NPS, CES, complaints, repeat contacts, reopens
- Analyze complaint and detractor verbatims for patterns, not individual stories
- Test experience consistency across channels, segments, regions, and hours
- Check whether QA scores match real customer outcomes; gaps reveal script-following
- Cover vulnerable customers, accessibility, and human-escalation paths



Cost, Productivity, and Value for Money

USE DATA. CONNECT TRADE-OFFS. DELIVER LASTING VALUE.

Cost per contact by channel



Cost per resolved issue

cost per contact
÷ FCR

$13.50 at 71% FCR
≈ $19.01 per resolution

Hidden costs

- Rework
- Escalations
- Overtime
- Failed self-service

- Assisted contact median $13.50 vs $1.84 self-service
- Channel ranges: voice $9–$16, chat $5–$9, email $6–$11
- Cost per resolved issue = cost per contact ÷ FCR
- $13.50 at 71% FCR ≈ $19.01 per resolution
- Test productivity claims against volume, complexity, quality trade-offs
- Hidden costs: rework, escalations, overtime, failed self-service
- Validate benefits realization against the business case for durability

Compliance, Risk, and Data Protection

- Check regulatory and contractual duties: consent, recording, retention, fair treatment
- AI service adds disclosure duties: EU AI Act Article 50 since August 2, 2026
- Verify privacy controls: PII redaction, scoped access, vendor DPAs, transfer safeguards
- Test controls with logged evidence; confirm critical incidents were closed
- Document residual risks with accept-or-mitigate recommendations



Synthesizing Findings, Scoring, and Prioritizing

Issue	Evidence	Impact	Root Cause	Owner	Severity	Status
						Met
						Not met
						Inconclusive
						Met

- Build a findings register: issue, evidence, impact, root cause, owner, severity, urgency
- Classify each criterion as met, not met, or inconclusive — keep conclusions proportionate to evidence
- Separate symptoms from systemic issues; split quick wins from structural fixes
- Calibrate reviewers and challenge findings with the project team before circulating the report
- Draft a balanced narrative: strengths to sustain, risks to contain, gaps to close



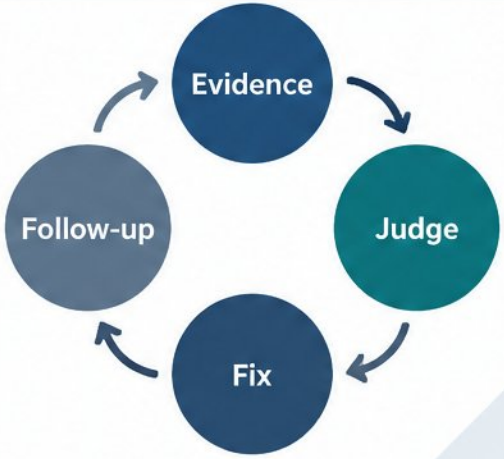
Reporting to Sponsors, Driving Action, and Common Pitfalls

Executive Summary → Scorecard → Findings → Recommendations → Owners and Dates → Re-review Rhythm

- Report structure: executive summary, scorecard, findings, recommendations, owners, dates
- Tailor the message for sponsors, operations leaders, and frontline teams
- Assign corrective actions an owner, due date, and success measure; set re-review rhythm

Pitfalls

- moving targets
- dashboard overreliance
- missing customer voice
- softened findings
- convenience sampling



Practice: draft three review questions and one recommendation for a migration or outsourcing scenario

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