

Designing a Repeatable Customer Service Process

- ▶ Consistency ensures every customer gets the same quality experience, regardless of agent
- ▶ Documented workflows reduce response times by up to 50% and cut complaints by 33%
- ▶ Repeatable processes speed onboarding: new agents reach competency 40% faster
- ▶ Move from reactive ticket handling to documented, measurable workflows
- ▶ Align support leaders, teams, and content creators around one service standard



The Cost of Inconsistent Service



- Siloed knowledge and disjointed tools fragment the customer journey



- Agent-dependent answers and varied tone lead to uneven experiences



- Untracked escalations hide where context or ownership breaks down



- Support that relies on memory strains team trust and content upkeep



- A shared operating model aligns support and content teams



Core Concepts: Standards, Playbooks, and Feedback Loops



- Service standards: measurable expectations for response time, tone, resolution, escalation



- Playbooks: repeatable decision guides for common scenarios, not rigid scripts



- Feedback loops: edge cases become process improvements



- Defaults beat descriptions; agents need answers in 10 seconds

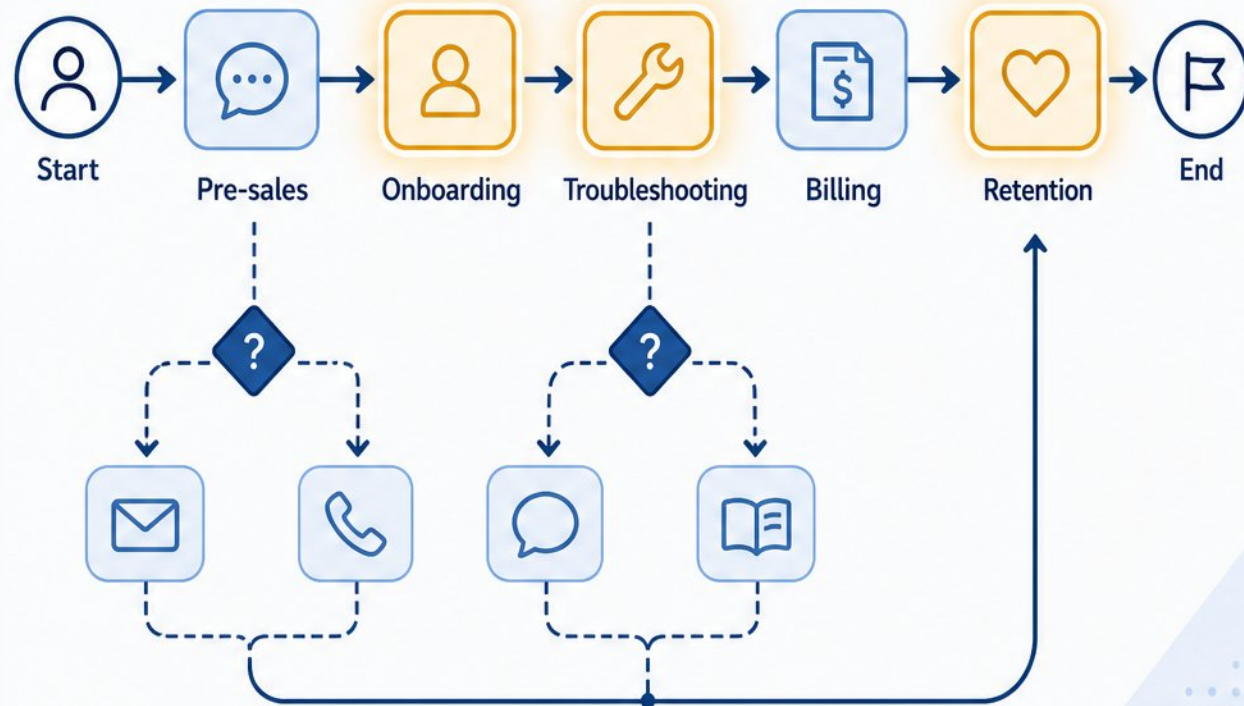


- Named owners and visible last-checked dates keep playbooks trustworthy



Mapping the Service Journey to Define Scope

- Identify high-value support stages: pre-sales, onboarding, troubleshooting, billing, retention
- Prioritize high-volume and high-risk interactions first
- Start narrow: one segment, one journey, with clear entry and exit points
- Keep judgment-based decisions flexible; standardize repeatable steps only



High-traffic and high-risk stage



Decision point (judgment-based)



Signal Flow Arrows

Documenting Workflows Support Agents Can Actually Follow



- - Write step-by-step playbooks for pressure: defaults, decision trees, escalation boundaries



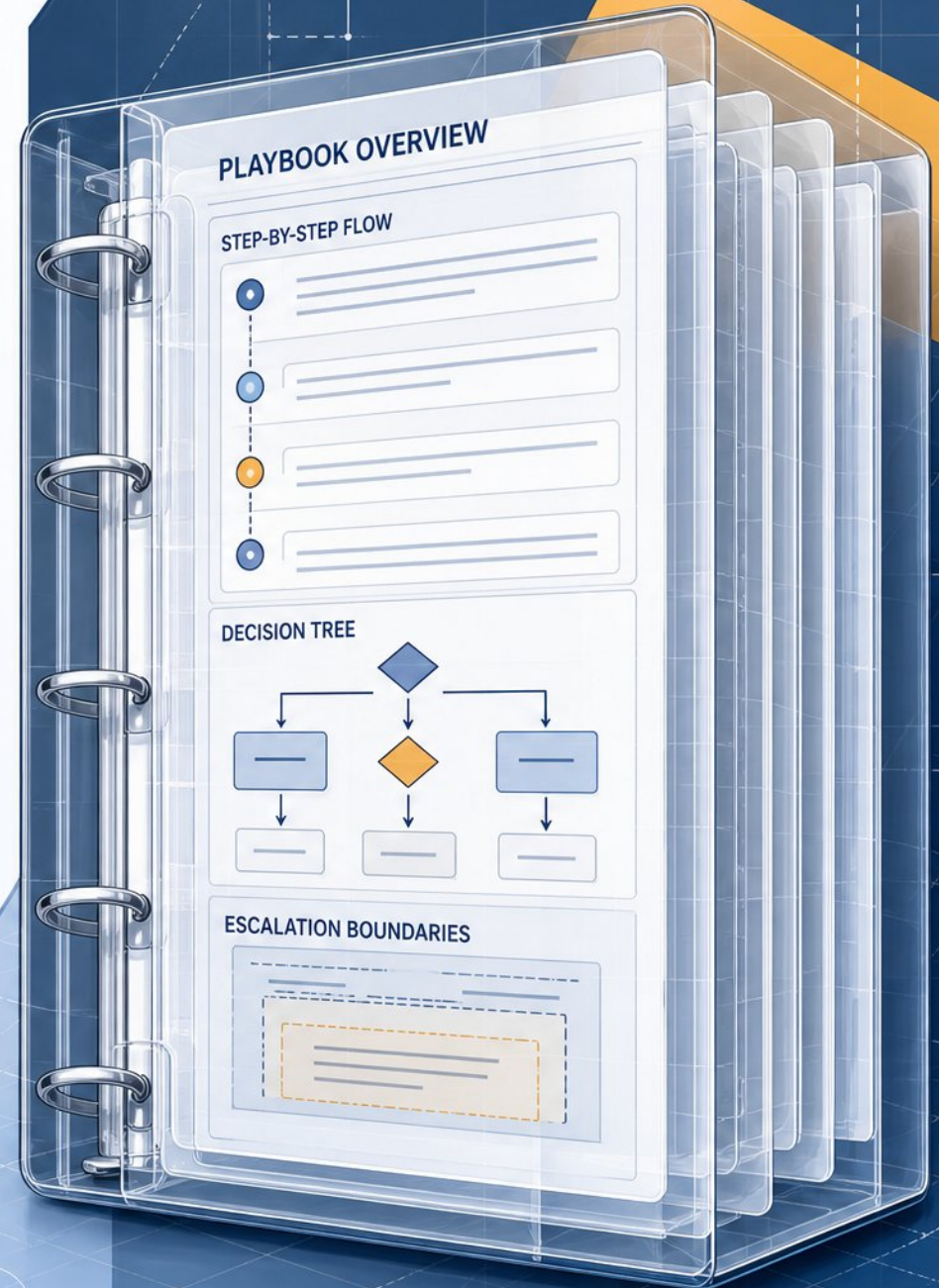
- - Use shared templates and consistent terminology across support, help content, and guides



- - Keep procedures scannable—2-3 minutes max to reference mid-conversation



- - Define owners for updates, quality checks, and version control



From Documentation to Daily Habits



- Build daily routines: intake, triage, response, follow-up, closure



- Use macros and snippets to save time, ensuring personalization



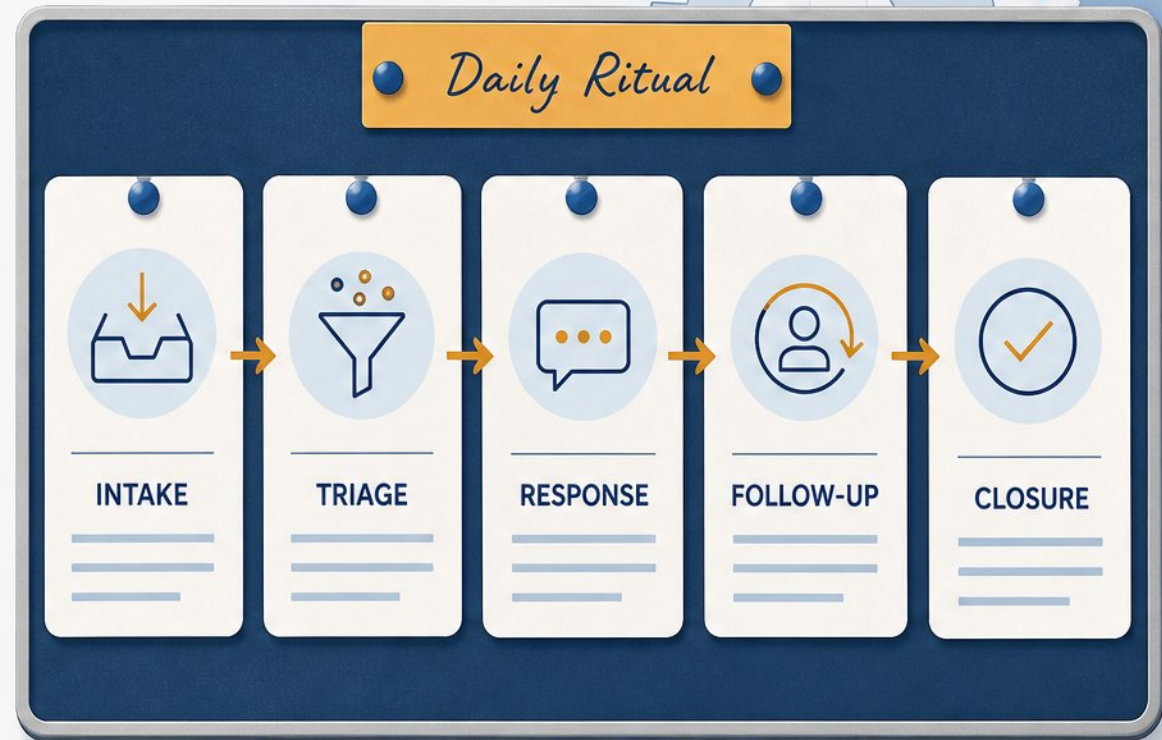
- Maintain accuracy by grounding responses in the knowledge base



- Balance structure with empathy and judgment under queue pressure



- Start with triage and summaries for quick wins and trust



Embedding Tone, Empathy, and Human Judgment



- **Tone** is an operational design choice: voice rules stay consistent, tone shifts by situation



- **Empathy** is a lightweight move: acknowledge the disruption, then move to action



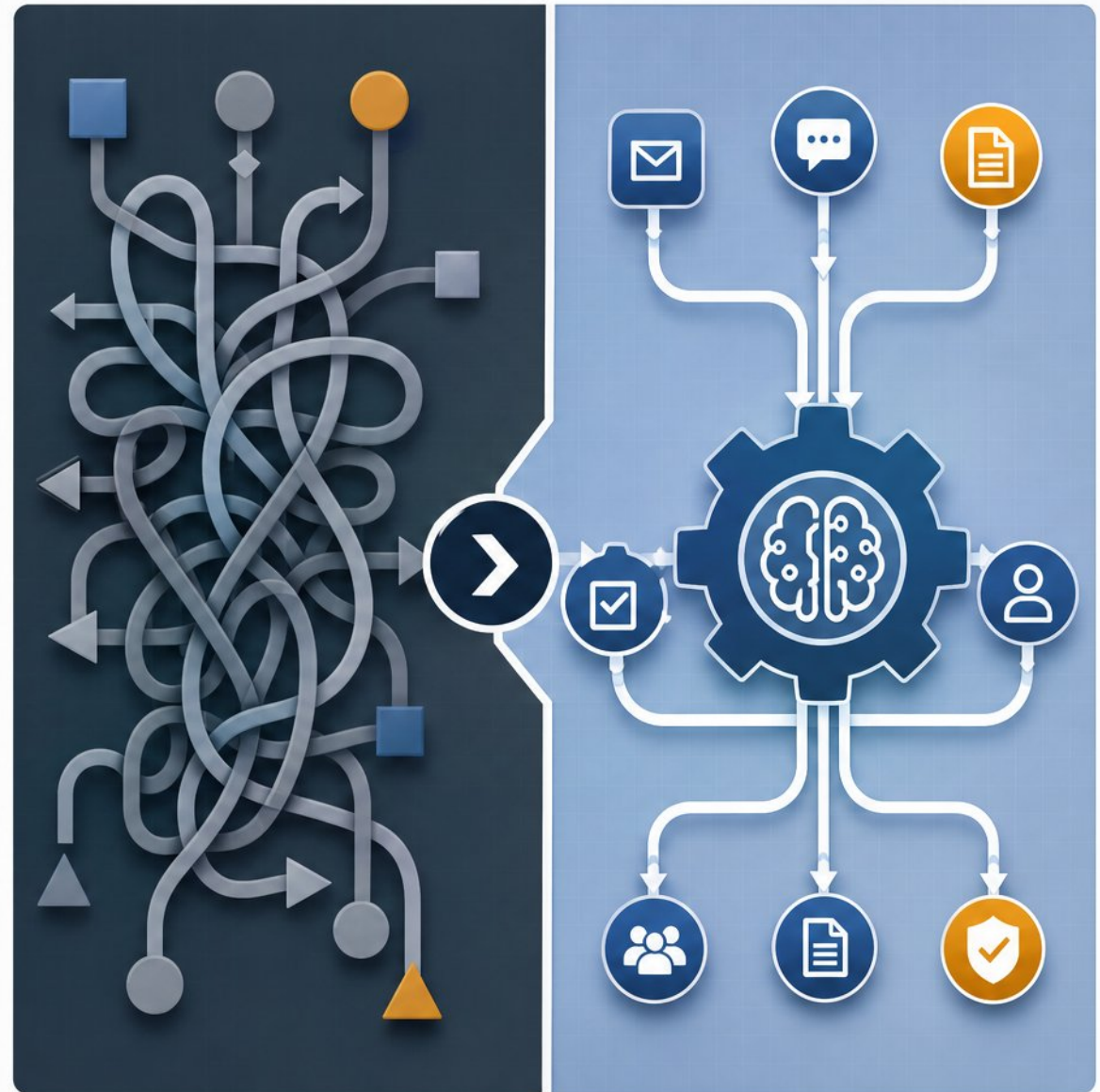
- Preserve **human judgment** at high-stakes points: money, policy, legal risk, and churn signals





AI, Automation, and the Repeatable Process

- Use AI for triage, routing, and drafting, not as a replacement for process discipline
- Define clear handoff rules: what AI resolves versus what escalates to humans
- Standardize first, then automate—chaos at speed just means faster chaos



Measurement, Audit, and Calibration



- Track consistency metrics: resolution time, adherence, re-contact rate, CSAT trends



- Run lightweight audits; score interactions with one rubric



- Calibrate reviewers so "good service" means the same everywhere

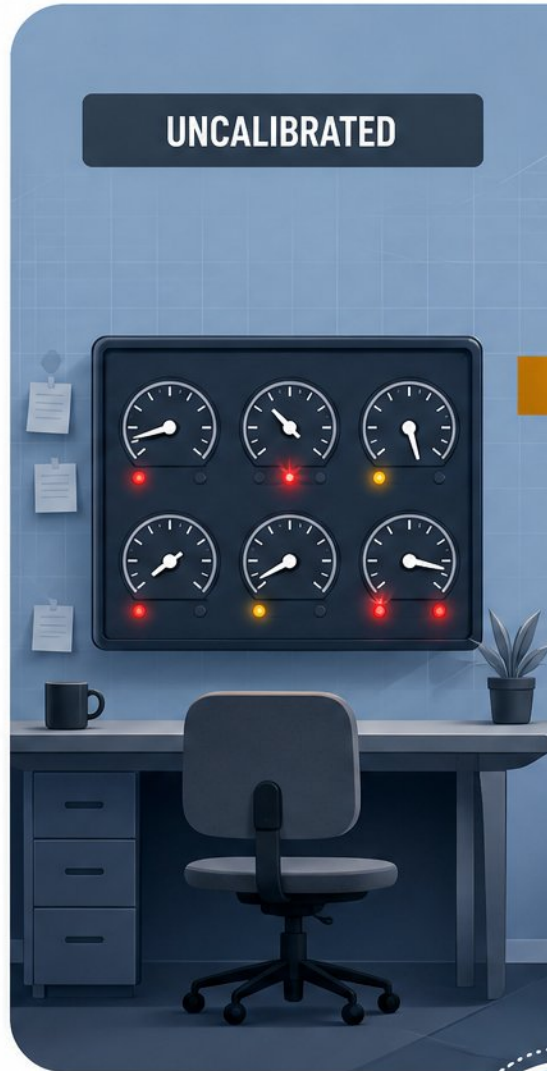


- Connect audit findings to workflow updates, not just grading

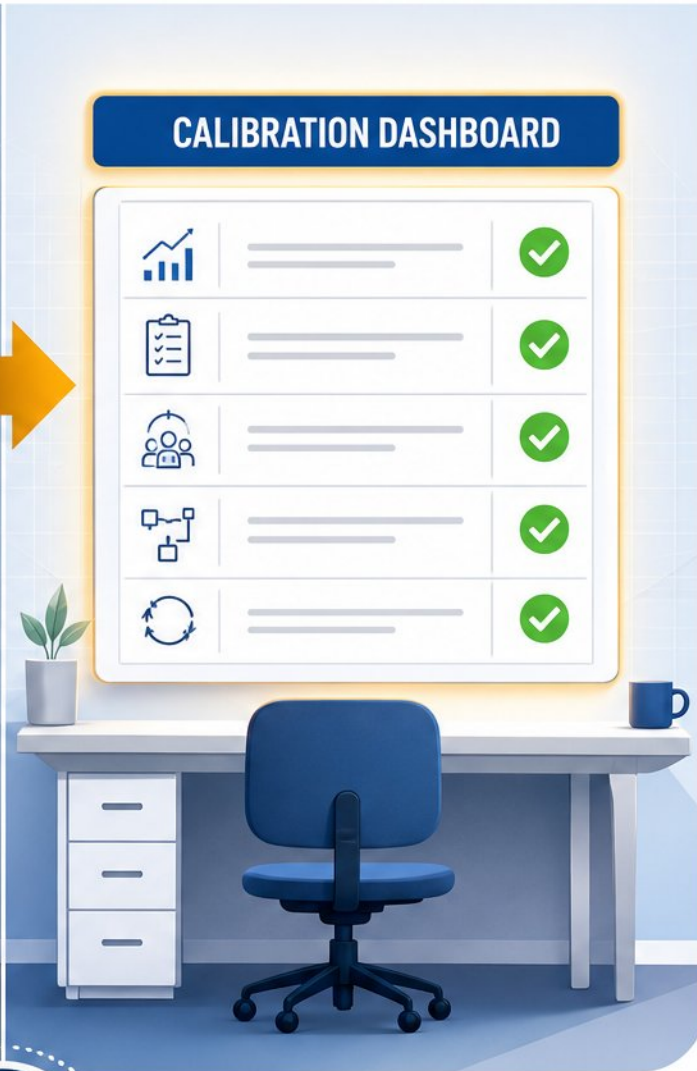


- Use audits as a learning loop to drive continuous improvement

UNCALIBRATED



CALIBRATION DASHBOARD



Keeping the Process Alive Over Time



- Avoid over-documentation, outdated playbooks, and rigid scripts creating friction



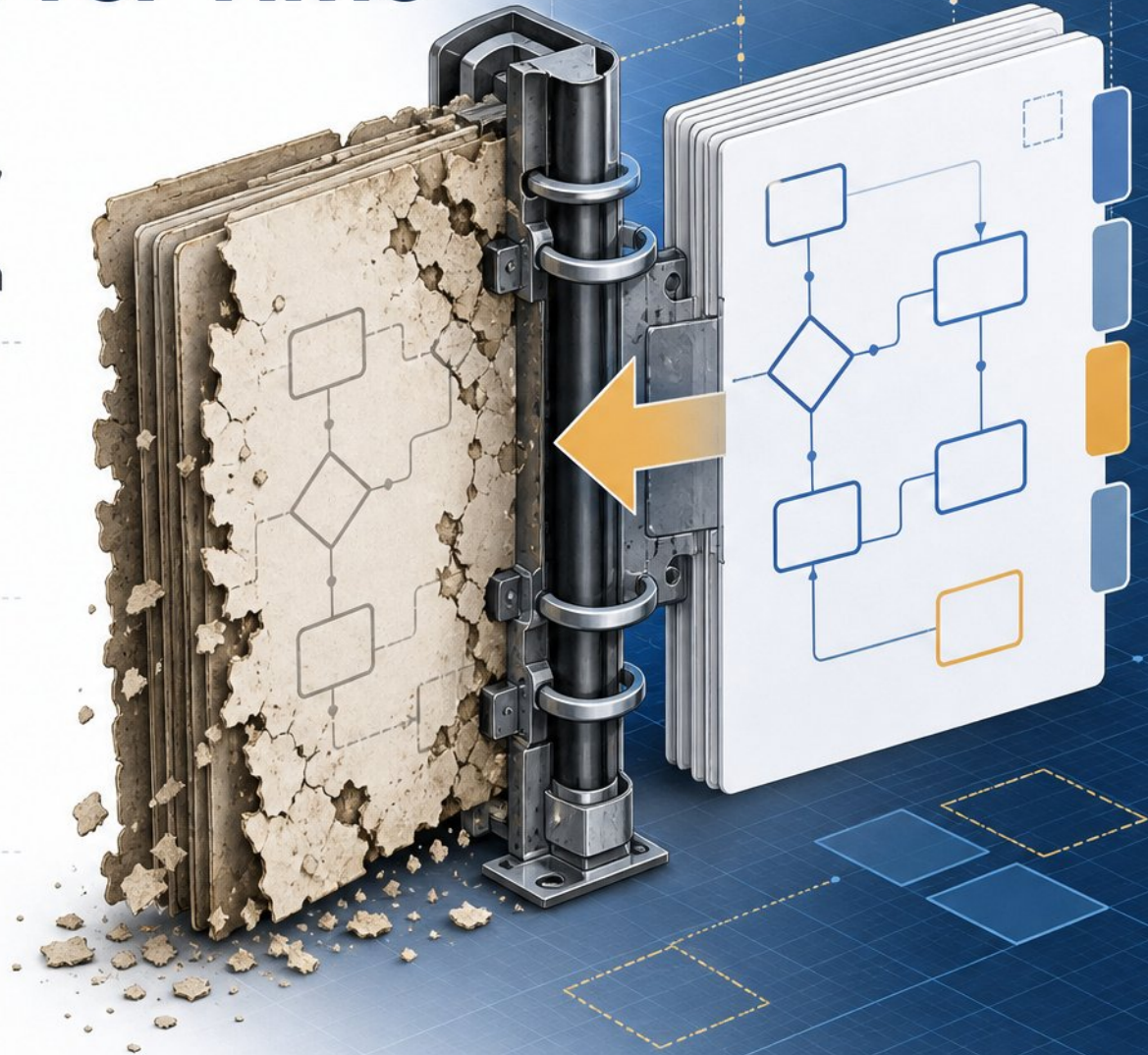
- Use formulas as a floor, not a ceiling; build in discretion by design



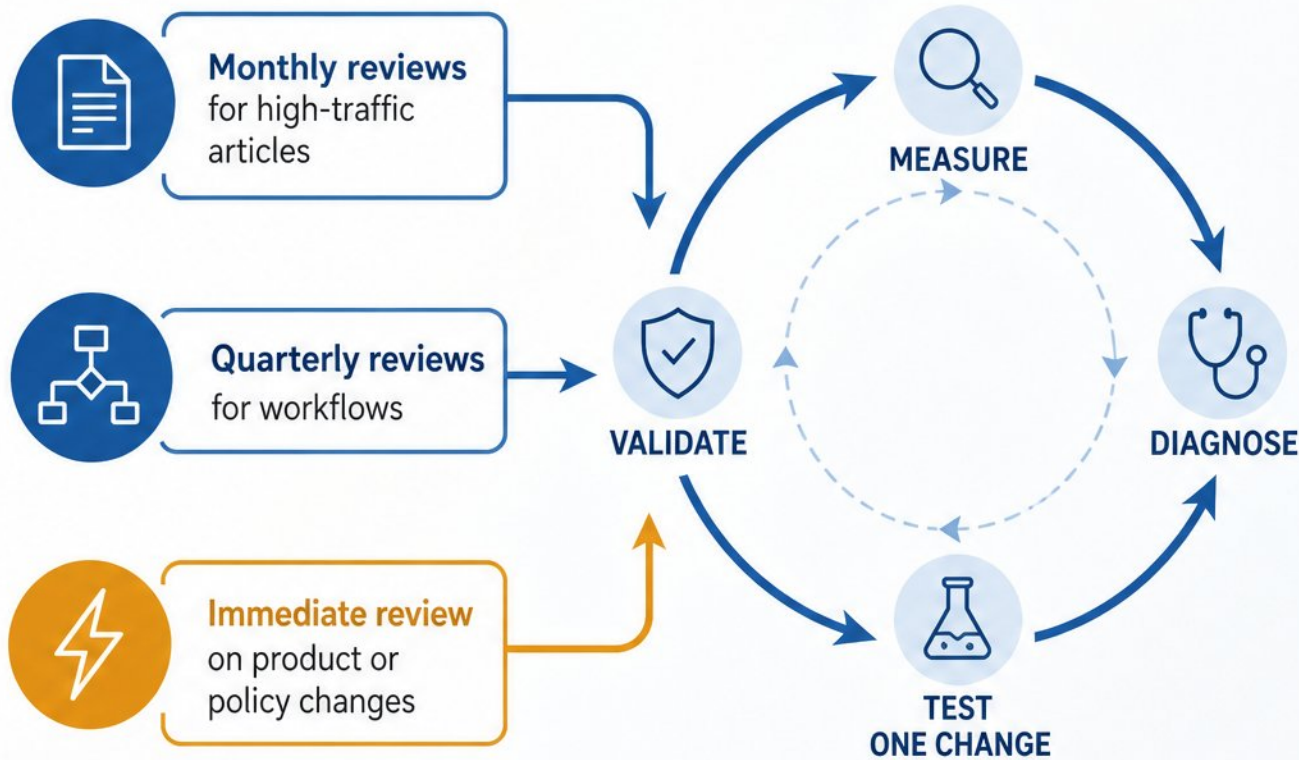
- Recognize signals for workflow revision, replacement, or retirement



- Build review triggers and ownership tied to product and policy changes



Review Cadences and Continuous Improvement



- Monthly reviews for high-traffic articles; quarterly for workflows
- Immediate review on product or policy changes
- Closed loop: measure, diagnose, test one change, validate
- Show last-updated dates, named owners, and release-linked triggers

Implementation Roadmap for Leaders and Content Creators



PILOT WORKFLOW

Start small
with real tickets



VALIDATION GATE

Review, learn,
and refine



SCALE WITH CONFIDENCE

Expand and embed
across workflows



- Pilot one workflow with real tickets, then scale



- Define milestones, owners, and review cadence



- Train with scenario-based exercises and onboarding materials



- Provide reference resources for agents and creators

Change Management and Adoption



- Treat standardization as a people change, not a documentation project



- Involve frontline agents and content creators in drafting workflows



- Launch a champion network for first-line questions and feedback



- Create a fast feedback loop so gaps get fixed before reaching customers



- Recognize early wins to sustain adoption beyond the initial rollout

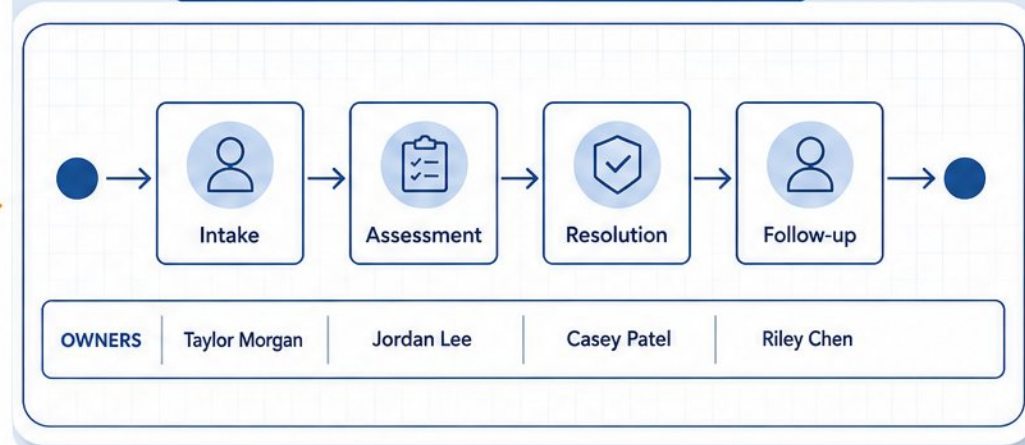


Action Planning: Your First Repeatable Workflow

BEFORE: UNSTRUCTURED



AFTER: REPEATABLE WORKFLOW



- Choose one priority service scenario to standardize



- Draft workflow, quality checks, and success measures



- Define clear owners for each workflow component



- Assign owners for the initial workflow rollout



- Agree on next steps and the 30-day review checkpoint

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