



# Customer Service Management Strategy and Operations Training Course

20 – 24 June 2027  
Chicago



## Customer Service Management Strategy and Operations Training Course

**Ref:** 735\_156081 **Date:** 20 – 24 June 2027 **Location:** Chicago **Fees:** 12000 Euro

### Overview

Customer Service Management Strategy and Operations Training Course is a five-day advanced course for service managers, operations leaders, supervisors, and department heads who leave with a Customer Service Management Operating System. Participants connect customer service strategy to service operating models, service standards, demand and capacity planning, channel governance, workforce controls, service performance metrics, and improvement portfolios. The course turns strategic intent into reviewable operating decisions. Agile Leaders Training Center develops customer service management strategy and operations.

### Who Should Attend

- Leaders responsible for customer service strategy and operating models
- Managers responsible for service demand, capacity, and workforce controls
- Supervisors responsible for standards, quality, and escalation performance
- Department heads responsible for channel governance and improvement priorities
- Analysts responsible for service scorecards and management reviews

The course assumes participants manage service operations or their controls and leaves out frontline interaction skills, CRM software operation, complaint-handling practice, sales techniques, and contact-center-only administration.

### Departments and Industries

The course supports departments and industries where service demand, channels, resources, and quality require coordinated management.

- Customer service and service operations
- Retail, online commerce, and consumer services
- Finance and professional services
- Healthcare and education services
- Utilities, facilities, and public-facing administration

### Learning Objectives

By the end of this course, participants will be able to:



- Build a customer service operating model
- Apply service standards and ownership controls
- Analyze demand, capacity, and workforce requirements
- Evaluate channel governance and escalation paths
- Use service performance metrics and scorecards
- Prioritize improvement initiatives through management review

## **Course Agenda**

### **Day 1: Strategy and Operating Model**

- Customer Service Strategy Alignment Map
- Service Operating Model Canvas
- Customer Demand and Service Promise Matrix
- Service Ownership and Accountability Chart
- Strategic Service Risk Register

### **Day 2: Standards and Channel Governance**

- Service Standard Definition Sheet
- Service-Level Objective Design Guide
- Channel Role and Suitability Matrix
- Cross-Channel Handover Control Map
- Escalation Authority Decision Table

### **Day 3: Demand, Capacity, and Workforce Controls**

- Service Demand Pattern Analysis Grid
- Capacity Requirement Planning Worksheet
- Workforce Coverage Control Board
- Queue and Workload Balance Review
- Demand-Capacity Response Playbook

### **Day 4: Quality, Metrics, and Improvement**

- Service Quality Control Plan
- Customer Service Performance Metric Tree
- Operational Scorecard Design Template
- Root-Cause and Corrective Action Log
- Service Improvement Portfolio Matrix



## **Day 5: Management Control Practice**

- Exercise: Align Strategy and Operating Controls
- Exercise: Set Standards and Channel Ownership
- Exercise: Balance Demand, Capacity, and Coverage
- Exercise: Review a Service Performance Scorecard
- Capstone: Customer Service Management Operating System

## **Practical Exercises**

The course uses suggested activities drawn from retail, finance, healthcare, and professional services.

- Suggested activity: map a service promise to an operating model, owners, standards, and risks.
- Suggested activity: compare channel roles and design a controlled cross-channel handover.
- Suggested activity: analyze a demand pattern and adjust capacity and workforce coverage.
- Suggested activity: review a scorecard and prioritize corrective actions within an improvement portfolio.

## **FAQs**

### **Who suits customer service management strategy training, and what does it assume?**

Service managers, operations leaders, supervisors, department heads, and analysts suit the training; it assumes responsibility for managing service delivery, resources, standards, controls, or performance.

### **How does customer service management strategy differ from frontline customer service training?**

Customer service management strategy governs operating models, standards, demand, capacity, channels, workforce controls, metrics, and improvement priorities rather than individual interaction techniques.

### **How should customer service management connect strategy to operations?**

Customer service management should translate the service promise into defined channels, ownership, standards, capacity rules, escalation authority, measures, and recurring management reviews.

### **Which customer service performance metrics belong on a management scorecard?**

Customer service performance metrics should reflect demand, access, timeliness, quality, resolution, workload, customer outcomes, and improvement progress, with each measure linked to an accountable owner and decision.



## Conclusion

Participants take back a Customer Service Management Operating System containing strategy maps, operating-model controls, standards, planning sheets, governance tables, scorecards, and an improvement portfolio. It changes disconnected service activities into coordinated management decisions. The system supports consistent review of demand, resources, channels, quality, risks, and corrective actions.