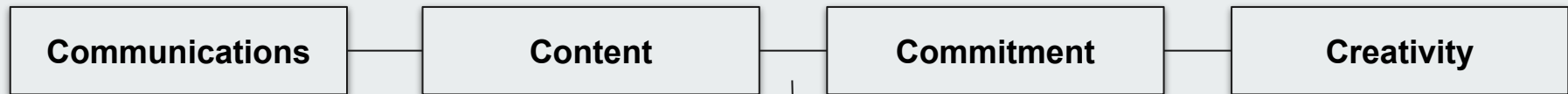


# Operational Strategy Roadmap

By: Santino Scibelli  
April 15, 2021





Projects	Goals	Metrics
A) Process Retrospective	A1) Increase automations A2) Decrease touch points	A1) Number of automations A2) Ticket data & interactions
B) The “Content Crunch”	B1) Improve documentation B2) Engage feedback	B1) Decrease in product questions B2) Content data (internal/external)
C) Journey Discoveries	C1) Create journey maps C2) Opportunity and solutions	C1) Decrease frictions C2) Expansion and accounts success
D) Career Connections	D1) New learnings D2) Annual Ambitions	D1) Number of new engagements D2) Number of annual goals complete

# Projects Overview



**A) Process Retrospective** - ongoing discussion, documentation, and review of processes.

Constantly seeking to discuss any gaps and collectively brainstorm next steps for customer and team successes.

**B) The “Content Crunch”** - participation in feedback, analysis, and identifying customer or internal content gaps. An extra opportunity for agents to be empowered to learn creating, peer reviewing, and publishing content for the knowledge base or internal wiki management sites.

**C) Journey Discoveries** - projects involving weekly customer reflections, case study opportunities, challenges to customer successes, and identifying levels of journey mapping for the Support Team or cross-department journey impacts with inventive solutions.

**D) Career Connections** - ongoing commitment to becoming the best version of yourself. Self-reflect on goals, what you hope to accomplish by the end of the year, and what opportunities interest you that sync with your career aspirations and personal development.

# Goals and Metrics Overview

## Process Retrospective

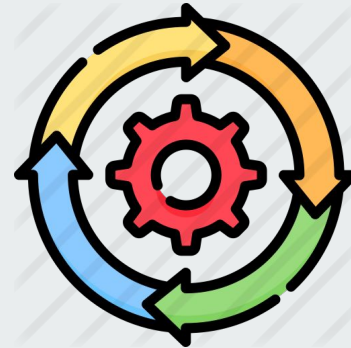
### Increase automations - Streamline workflows

Metric 1: Number of new automations created (Goal of X automations - reduce handle time)

### Decrease touch points - Improve success

Metric 2: Analyze ticket data and interactions trend with:

- Avg. first reply
- CSAT
- Handling Time
- Number of responses
- Incident evolution



# Goals and Metrics Overview

## Content Crunch

### Improve documentation - Knowledge Base & Internal Wiki

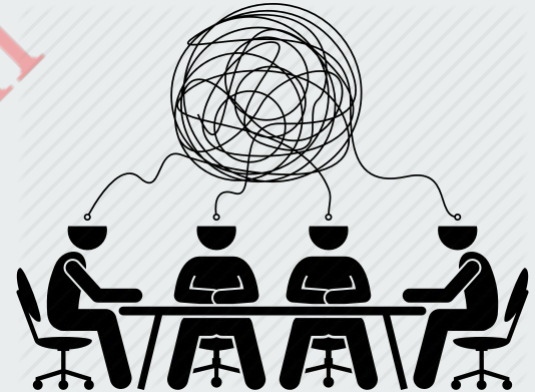
Metric 1: Decrease in product questions with a:

- Goal of X New Articles
- Goal of X Decrease in Product-Question Query Type Use

### Engage Feedback - Brainstorming and Feedback Loops

Metric 2: Content data (Internal/External)

- Analytics data for popular and new knowledge base guides
- Internal performance and discussions on internal wiki content



# Goals and Metrics Overview

## Journey Discoveries

**Create journey maps - identify customer experience**

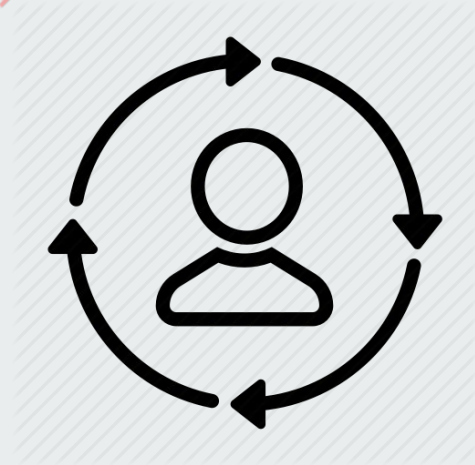
Metric 1: Decrease frictions

- Goal of X journey maps created
- Identify X types of customer personas

**Opportunity and solutions - build relationships**

Metric 2: Expansion and account success

- Use insight data to grow X accounts
- Expansion goal for \$X



# Goals and Metrics Overview

## Career Connections

**New learnings** - skills, workshop, development

Metric 1: Number of new engagements

- Online or lecture courses
- Workshops or webinars
- Volunteering or mentorship
- Discuss miscellaneous opportunities

**Annual Ambitions** - work toward your goals

Metric 2: Number of complete goals (X checked off out of your Y total list)



Thank you for your time and consideration.

*"I can't change the direction of the wind, but I can adjust my sails to always reach my destination." - Jimmy Dean*

