



SUPPORT CUSTOMER ENGAGEMENT LEAD

Certificate in IT Customer Engagement Leadership

Course Code: IT_1001

Duration: 45 Hours

Delivery Format: Hybrid

Target Audience:

- Current team leaders/supervisors
- Aspiring team leads
- Customer service managers
- Project managers (IT service focus)
- Anyone involved in IT service management

Program Outcomes:

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

- Describe the functions and responsibilities of a customer engagement lead.
- Supervise and coordinate a customer service team to ensure efficient operations.
- Handle escalated customer issues and provide appropriate solutions.
- Monitor team performance using KPIs and service metrics.
- Coach and mentor team members to enhance customer service delivery.
- Collaborate with other departments to resolve customer-related issues.
- Analyze customer service processes and propose improvements.
- Document and report customer service activities and team performance effectively.

Detailed Syllabus

Module 1: Role and Responsibilities of a Customer Engagement Lead

Outcome: Learners will be able to describe the functions and responsibilities of a customer engagement lead, including defining and aligning service goals and standards.

Topics:

- Introduction to leadership in customer service
- Defining goals and service standards
- Aligning service with organizational objectives

Activities:

- Discussions on leadership styles in customer service.
- Analyzing case studies of effective customer engagement leadership.
- Brainstorming session on setting SMART (Specific, Measurable, Achievable, Relevant, Time-bound) service goals.

Assessments:

- Short essay or presentation on the key responsibilities of a lead.
- Participation in group discussions.

Module 2: Team Supervision and Management

Outcome: Learners will be able to supervise and coordinate a customer service team to ensure efficient operations, including task delegation, performance monitoring, and conducting effective team sessions.

Topics:

- Delegating tasks and setting priorities
- Monitoring staff performance and attendance
- Conducting briefings and support sessions

Activities:

- Role-playing scenarios for delegating tasks and providing constructive feedback.
- Developing a sample team briefing agenda.
- Analyzing mock performance reports and identifying areas for improvement.

Assessments:

- Practical exercise on creating a task delegation plan.
- Evaluation of a simulated team briefing.

Module 3: Handling Escalations and Complex Issues

Outcome: Learners will be able to handle escalated customer issues and provide appropriate solutions, applying conflict resolution and problem-solving techniques while managing customer expectations.

Topics:

- Identifying issues that require escalation
- Conflict resolution and problem-solving techniques
- Managing customer expectations and follow-ups

Activities:

- Simulated customer escalation scenarios with role-playing and feedback.
- Case studies focusing on complex customer issues and their resolution.
- Developing communication strategies for managing difficult customer expectations.

Assessments:

- Practical assessment of handling an escalated customer call/interaction.
- Written analysis of a complex issue resolution.

Module 4: Performance Monitoring and KPIs

Outcome: Learners will be able to monitor team performance using KPIs and service metrics, including setting, tracking, and analyzing performance data.

Topics:

- Setting and interpreting performance indicators
- Tools and methods for performance tracking
- Analyzing service quality metrics.

Activities:

- Identifying relevant KPIs for different customer service scenarios.
- Working with sample data to calculate and interpret KPIs.
- Exploring various performance tracking tools (conceptual overview).

Assessments:

- Assignment on selecting appropriate KPIs for a given scenario and justifying choices.
- Analysis of a provided performance data set with recommendations.

Module 5: Coaching and Mentoring Team Members

Outcome: Learners will be able to coach and mentor team members to enhance customer service delivery, by assessing performance, developing improvement plans, and providing effective feedback.

Topics:

- Assessing team strengths and weaknesses
- Developing improvement plans
- Providing constructive feedback and guidance

Activities:

- Role-playing coaching sessions with team members.
- Developing individual improvement plans based on mock performance reviews.
- Practicing different feedback delivery techniques.

Assessments:

- Practical assessment of a simulated coaching session.
- Submission of a drafted improvement plan for a hypothetical team member.

Module 6: Interdepartmental Coordination

Outcome: Learners will be able to collaborate with other departments to resolve customer-related issues effectively.

Topics:

- Working with technical, sales, and operations teams
- Communicating cross-functional issues
- Coordinating customer service solutions

Activities:

- Case studies involving cross-departmental collaboration to resolve customer issues.
- Discussions on best practices for interdepartmental communication.

- Developing a communication plan for a complex cross-functional issue.

Assessments:

- Scenario-based assignment on coordinating with other departments.
- Participation in group discussions on collaboration challenges.

Module 7: Continuous Improvement in Customer Service

Outcome: Learners will be able to analyze customer service processes and propose improvements, including identifying areas for enhancement, reviewing SOPs, and measuring the impact of changes.

Topics:

- Identifying areas for improvement in service delivery
- Reviewing and revising SOPs
- Implementing changes and measuring impact

Activities:

- Analyzing existing customer service processes and identifying bottlenecks or inefficiencies.
- Proposing and justifying improvements to a given SOP.
- Discussions on methodologies for implementing and measuring change.

Assessments:

- Project proposal for a customer service process improvement.
- Presentation outlining a revised SOP and its expected impact.

Module 8: Documentation and Reporting

Outcome: Learners will be able to document and report customer service activities and team performance effectively, including writing reports, recording feedback, and presenting findings.

Topics:

- Writing service reports and analysis
- Recording customer feedback and team activities
- Presenting findings to stakeholders

Activities:

- Practicing writing comprehensive service reports based on provided data.

- Developing a system for recording and categorizing customer feedback.
- Preparing and delivering a short presentation of key findings to a mock stakeholder group.

Assessments:

- Submission of a detailed service report.
- Evaluation of a short presentation.

Module 9: Practical Evaluation and Final Assessment

Outcome: Learners will demonstrate overall proficiency in leading and supporting customer engagement operations.

Activities:

- Simulated team leadership exercises
- Handling real-time escalations

Assessments:

- Final project presentation and performance review