



## **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