





















Customer Service: Action Plan

Date Revised: _____

Priority	Department Goals & Team Member Goals	Who	Year End Target	% Complete/ YTD	Status/ Variance	Due Dates	Comment
High	3.1 Obtain one new client per day who has purchased Basic Package. (# of Basic Packages)	Customer Service	30	19	-11	12-31-2008	Changed strategy
Low	3.1.1 Explore and research habits of new customers to determine how best to deliver.	Customer Service	100%	100 %		6-1-2008, 12-31-2008	
High	3.1.1.1 Compile names and industries of new customers to study.		10	100 %		6-1-2008, 11-28-2008	Report from client
High	3.1.2 Increase web traffic by 100%.	Customer Service	100%	25 %		1-1-2008, 6-1-2008	
High	3.2 Develop understanding of technological issues. (% complete)	Customer Service	100%	55%	-45%	9-30-2008	
High	3.2.1 Send email blast to existing customers to explore their unique requirements new software solutions.	Customer Service	200	10 %		7-31-2008, 12-31-2008	Sent out on Aug. 30
High	3.2.1.1 Compile current customer list		100	0 %		5-26-2008, 9-30-2008	
Low	4.1 Obtain 4 new clients per month who have purchased Premium Software package. (# of Premium Packages)	Customer Service	4	0 %		8-31-2008	
Low	4.1.1 Do email blast to current customers to explore their commitment of resources and time.	Customer Service		100 %		7-1-2007, 7-29-2008	Test
Normal	4.1.1.1 Compile names and email addresses of current customers from Premium Software package new customer list.	Randall Scion	100	0 %		6-1-2008	

Low	4.2 To provide increased value to all existing online customers to enhance "stickiness." (Retention rate of current customers)	Customer Service	65%	0 %		9-15-2008	
Low	4.2.1 Hold online focus group to explore pricing and value of Premium package	Customer Service		50 %		1-1-2007, 6-30-2008	Completed ahead of schedule.
	4.2.1.1 Organize participants for the first focus group	Sue Smith		100 %		2-8-2007, 3-31-2008	
	4.2.1.2 Complete a competitive pricing analysis	Mikey Houglan		0 %		2-8-2008, 3-19-2008	
Low	5.1 To develop webinars (# of webinars per month)	IT Group	4	0 %		9-30-2008	
Normal	5.1.1 Develop 15 minute "Basic Package" presentation	Customer Service	100	10 %		1-1-2008, 3-31-2008	
Normal	5.1.1.1 Review existing presentations format for consistency	Sue Smith	100%	30 %		7-1-2008, 7-31-2008	Comment 1 (6/1/07)
	5.2 Update software "how-to" books. (# of books updated)	Customer Service	3	0 %		11-30-2008	
	5.2.1 Accumulate and synthesize all corrections and revisions for books.	Customer Service		0 %		1-1-2008, 9-30-2008	
High	5.2.1.1 Gather corrections and revisions for books from each department head		100	0 %		5-1-2008	
	5.2.2 Hire editor/writer for updates.	Customer Service		0 %		1-1-2008, 9-30-2008	
	5.2.2.1 Review resumes on file	Sue Smith		100 %		2-8-2008, 12-22-2008	
Normal	5.2.3 Increase sales by...	Customer Service	\$200,000.00	0 %		1-1-2008, 12-31-2008	

	5.4 To finalize New Software Plan with summary statistic pages (% complete)	Web Specialists	100%	0 %		6-30-2008	
	5.4.1 Develop quantitative basis for all benchmarks	Customer Service		0 %		1-1-2008, 6-30-2008	
	6.1 Set up computers to be accessed from any destination. (# of computers)	Customer Service	5	0 %		12-31-2008	
	11.2 To support individual staff personal development plans. (% of staff with plans.)	Administration	100%	0 %		7-31-2008	
	11.2.1 Research facilitation training programs.	Customer Service		0 %		1-1-2008, 6-30-2008	
	11.2.2 Have all staff complete a 3 year development plan.	Customer Service		0 %		1-1-2008, 7-31-2008	
	11.2.2.1 Create sample development plan for reference	Mikey Hougland		0 %		2-8-2008, 2-22-2008	
	12.1 Increase the number of innovative ideas through an incentive program. (# of innovative ideas implemented.)	Administration	5	0 %		9-30-2008	
	12.1.1 Develop a program to encourage ideas from everyone.	Customer Service		0 %		1-1-2008, 9-30-2008	
Normal	12.1.1.1 Research best practices in building employee morale	Mikey Hougland	5	0 %		5-1-2008	
	12.1.2 Throw a party to kick off incentive program.	Customer Service		0 %		1-1-2008, 9-30-2008	
	12.1.2.1 Determine budget for party	Sue Smith		50 %		2-8-2008, 12-15-2008	Finish next week.
	12.1.2.2 Solicit ideas for theme, entertainment, catering	Sue Smith		0 %		2-8-2008, 2-22-2008	