



RUTZ CONSULTING



LEAP – How to design your Operational Handbook

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Could you take a sabbatical?

Could you take a sabbatical for one month - or even six months starting tomorrow?

No?

Let's list all the reasons as to why you think you can't take time off:

1. _____
2. _____
3. _____
4. _____
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11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____
21. _____

The Why of your Operational Handbook

What would need to happen so that you could take time out? - Yes - you would need to be sure that somebody else can pick up your work-load and run with it.

That's why you need an operational handbook in your contact center.

Just think - if you were able to take time off tomorrow - if your business or your department would run without you...
What would this give you?

1. _____
2. _____
3. _____
4. _____
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6. _____
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19. _____
20. _____
21. _____

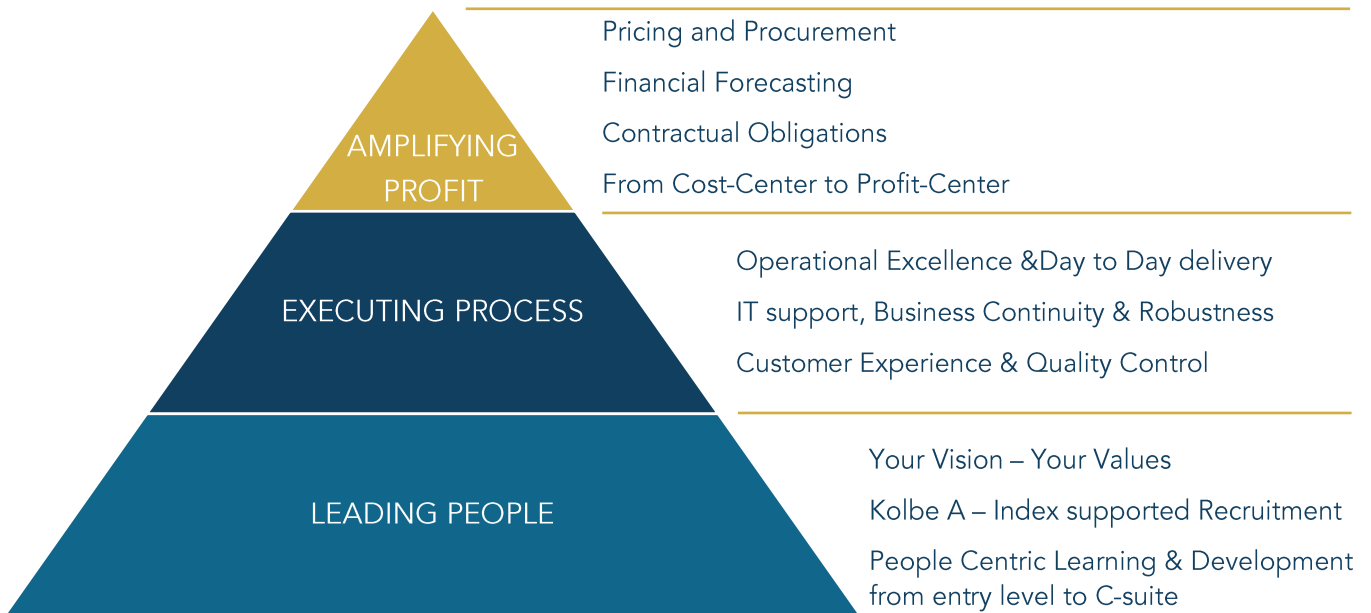
The LEAP Framework

Your Operational Manual follows the LEAP Framework

Leading People

Executing Process

Amplifying Profit



Sections you must cover

Section 1 - Recruitment and On-Boarding (Leading People)

For Example:

- ❖ Where do you recruit
- ❖ Who are you using to recruit
- ❖ Interview Process
- ❖ Assessment Center
- ❖ Employee Handbook
- ❖ Leavers Process

Your Firm's Specifics

Section 2 - Training and Development (Leading People)

For example:

- ❖ Initial product training,
- ❖ Customer service training,
- ❖ Systems training, Telephone manner training

Your Firm's Specifics

Section 3 - Contact Details (Leading People)

For Example

- ❖ Every single Subject Matter Experts contact details, email, phone number, title, a short description of responsibilities/job.
- ❖ Client details
- ❖ Taxi Firms
- ❖ Your preferred supplier for food orders
- ❖ The hospital
- ❖ The nearest Doctor
- ❖ Letting Agencies (if for example, you re-locate staff)

Your Firm's Specifics

Section 4 - Operational Day to Day Processes (Executing Process)

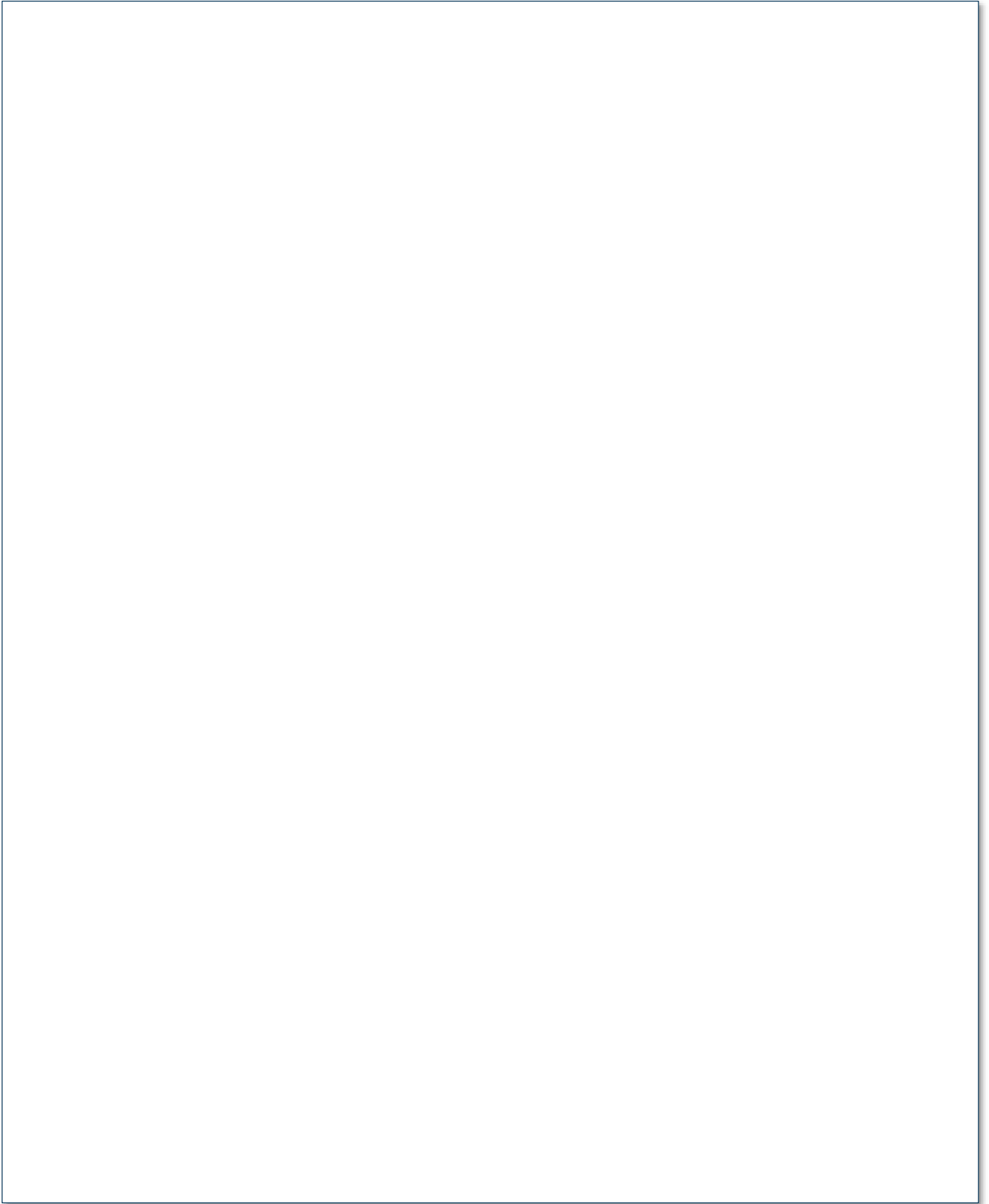
For Example

- ❖ How to request a password reset
- ❖ How to conduct a stand-up meeting
- ❖ How to find information in your knowledge base system
- ❖ How to request holidays
- ❖ How to prepare for a monthly business review? Which PowerPoint deck to use
- ❖ How to onboard a new account or a new client
- ❖ How to use your HR system, for example, cascade or similar
- ❖ How does the fire drill work?
- ❖ Quality Monitoring Process
- ❖ Net Promoter Scores Process
- ❖ Reporting Processes (where does the data come from?)
- ❖ Copy or a Link to your statement of work

Your Firm's Specifics

Section 5 - Business Continuity Process and Disaster Recovery (Executing Process)

Your Firm's Specifics



Section 6 - Financials (Amplify Profit)

For Example:

- ❖ Salary Structure
- ❖ Bonus Payments
- ❖ Salary Increases
- ❖ Purchase Orders
- ❖ Budgeting Process
- ❖ Cost per contact
- ❖ Service Credits
- ❖ Penalties

Your Firm's Specifics

Bravo - you have got the outline of your operational Manual! Well done!

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The Operational Excellence Show –
<https://rutzconsulting.com/podcasts>

