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**Document Control**

**Document Version History**

This table shows a record of significant changes to the document.

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| **Version** | **Date** | **Author** | **Description of Change** |
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**Approvals**

This table shows the approvals on this document for circulation, use and withdrawal

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| **Version** | **Date** | **Approver** | **Title/Authority** | **Approval Remarks** |
| 1.0 |  |  |  |  |
| 1.1 |  |  |  |  |
| 1.2 |  |  |  |  |

# **Purpose**

The CSI plan template helps you to analyse and prioritize the risks and opportunities for your company. It includes sections on: Strategic alignment, Risk Management, Opportunities/Actions.

# **Scope and Users**

The scope of the template includes analysis, planning, and execution. It provides the framework for developing your organization's mission, vision, objectives, and goals.

Users of the CSI Plan Template are those who have a long-term strategic plan for their company and want to measure progress against this goal. This template is used by companies

# **Policy**

* They outline the expectations and specifications for the project, as well as how to measure success.
* It is meant to be used as a guideline for those who are responsible for developing and implementing plans of action within their organization.
* This policy also includes details on how you can correct or delete your data if necessary.
* This policy is broken down into four sections: the organization's mission statement, the definition of risks and threats, creating a plan for dealing with those threats and lastly, creating an emergency response plan.

# **Reference to the process**

The reference to process in CSI Plan is a fundamental component of the plan. The CSI Plan Process defines how the investigation will be conducted and what all steps are required for it. It also outlines who is responsible for each step, as well as what resources need to be available for this task.

* 1. **Example for Reference to the Process:**

|  |  |  |
| --- | --- | --- |
| Process | Resources | Responsible |
| Incident Management | Major Incident Report | Sam |
| Service Management | Service Level Requirements | Mark |
| Problem Management | Problem Record | Mark |
| Change Management | Change Management Process | Sam |

# **Review:**

The Review of CSI Plan is an in-depth analysis of the strategies that can be used to improve customer service. It focuses on how to identify the gaps in your company's customer service and then take steps to fix them. The result is a plan for improving customer satisfaction, which will ultimately lead to increased revenue streams.

# **Introduction**

The contact details of the CSI manager are essential for any business. The CSI manager is responsible for overseeing all projects and making sure that they go smoothly. Ensuring that their contact information is up to date will help them easily be contacted when necessary

|  |  |
| --- | --- |
| **Manager Details** | |
| **PROJECT:** < Insert Name > | **PROJECT MANAGER:** < Instructor Name > |
| **CREATED BY:** < Insert Name > | **LAST UPDATED BY:** < Insert Name > |
| **DATE CREATED:** MM/DD/YYYY | **LAST DATE UPDATED:** MM/DD/YYYY |

# **Process Activities:**

**Improvement of strategy** in a CSI plan is the key to success.

* Strategy improvement is important because it ensures that plans are properly developed and implemented.
* An organization can't simply create a strategic plan with no thought or consideration for an improvement process.
* A strategy needs to be monitored, managed, evaluated, revised, and updated on a continual basis to stay relevant.

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| --- | --- |
| **Terms** | **Strategy** |
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# **2.1 Define Set of Goals:**

The CSI Plan Template is one way that can be used as a guide when developing plans or strategies, which includes defining the following:

* The goal(s) of the program
* Specific objectives and target dates for each goal
* The resources required to reach targets
* The risks and mitigating actions
* A timeline for planning and assessing the program’s progress.

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| --- | --- | --- | --- |
| **Strategy for Improvement** | | | |
| **Inputs** | **Improvement Goals** | **Key Objectives** | **Overall Vision** |
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# **2.2 Metrics:**

Metrics are key to successful CSI plans, as they provide the necessary framework to measure the effectiveness of each step taken.

* Metrics are a critical part of any conversion-centered design plan.
* They help you measure whether the changes you made actually improved conversions
* They offer insight into the effectiveness and efficiency of running an operation, as well as help to identify opportunities that can be taken advantage of in order to improve performance.

# **2.3 What will be Measure?**

The CSI will measure the current level of customers' satisfaction with services provided by your company.

# **2.4 Gather all data identified as needed and measurable**

The first step to conversion rate optimization is gathering all the data you need. This includes all the data that needs to be gathered and any measurable information. Before anything else, ask yourself these questions: "What are my goals?", "Who am I targeting?", "What will make them convert?". Once you know this, it's time to start gathering your data!

# **2.5 Process the Data**

**Analyse the data -** The first step is analysing the data and understanding what customers want or how they behave. This will help you understand what your customers want based on their behaviour patterns.

**Identify opportunities -** After you have analysed customer behaviour, you should identify any opportunities where changes can be made to increase sales conversions. It's important not only to focus on one opportunity because customer behaviours may vary during different times of day or seasons so changes might need to be made based on these factors as well.

**Implement change -** Once an opportunity has been identified

1. **Roles And Responsibilities:**

Responsibilities of CSI Manager

* A CSI manager is responsible for leading a team of forensic accountants.
* Their job entails managing the day-to-day operations, including assigning work to their employees, and overseeing deadlines.
* They are accountable for all company decisions, which can include anything from personnel issues to budgeting concerns.

# **Critical Success Factors (CSF) And Key Performance Indicators (KPI):**

KPI is the measurement of how well an organization is performing against its goals, while CSF are those goals themselves.

|  |  |
| --- | --- |
| **Critical Success Factor** | **Key Performance Indicator** |
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# **Managing Records:**

Records are the information stored in a database or data warehouse, which can be used for reporting and analytics purposes.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Records** | | | | |
| **Record Name** | **Storage Locations** | **Person Responsible for Storage** | **Controls for Record Protection** | **Retention Time** |
|  |  |  |  |  |
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# **Recovery Plan:**

A Recovery Plan is a document that details the steps one needs to take to recover from an incident. A Recovery Plan should be written before any incidents happen, so this way it can be used immediately when needed.

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| --- | --- | --- | --- |
| **Recovery Plan** | | | |
| **Service** | **Owner** | **Recovery Details** | **Expected Recovery Time** |
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1. **Validity and Document Management:**

It ensures that all files are valid, which means they have been created by authorized users with sufficient privileges, according to policies or guidelines.

1. **Appendences:**

**Appendix 1:** Service Management Plan

# **CSI Process Diagram:**

*Define what you will measure*

*Process the data*

*Identify Opportunities*

*Present and use the information*

**Gather the Data**

**Plan**

**Do**

**To**

**Action**

**Implement Improvement**

**Identify the Strategy**

**Analyse the Data**