

Customer Service Playbook

Use this template to convert support coaching videos into ecommerce service playbooks.

Template Metadata

| Field | Details |
|----------------|--|
| Category | Retail & Ecommerce |
| Owner | [Team or owner] |
| Version | [Version number] |
| Effective Date | [Date] |
| Review Cycle | [Monthly / Quarterly / Annual / Event-based] |
| Status | [Draft / In Review / Approved] |

Service Principles

Summarize tone, response standards, and customer experience goals.

| Item | Details | Owner | Status |
|-----------------------|---|---------|-------------------|
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |

Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

Contact Types

List common contacts such as order status, delivery issue, return, refund, cancellation, and product question.

| Item | Details | Owner | Status |
|-----------------------|---|---------|-------------------|
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |

Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

Triage Flow

Document how agents identify customer intent, verify account details, and prioritize cases.

| Item | Details | Owner | Status |
|-----------------------|---|---------|-------------------|
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |

Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

Resolution Steps

Provide step-by-step guidance for each major contact type shown in the video.

| Item | Details | Owner | Status |
|-----------------------|---|---------|-------------------|
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |

Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

Macros

Include short response templates based on wording demonstrated in the video.

| Item | Details | Owner | Status |
|-----------------------|---|---------|-------------------|
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |

Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

Escalation Rules

Define when agents escalate to warehouse, billing, fraud, or supervisor teams.

| Item | Details | Owner | Status |
|-----------------------|---|---------|-------------------|
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |

Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

QA Checklist

Create a checklist reviewers can use to score completed cases.

| Item | Details | Owner | Status |
|-----------------------|---|---------|-------------------|
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |

Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

Review and Signoff

Document review conclusions, approvals, unresolved items, and next review date.

| Role | Name | Date | Notes |
|----------|--------|--------|---------|
| Preparer | [Name] | [Date] | [Notes] |
| Reviewer | [Name] | [Date] | [Notes] |
| Approver | [Name] | [Date] | [Notes] |