

SVQ3 in Customer Service at SCQF Level 6 (4427-03)



Qualification handbook for centres

www.cityandguilds.com
February 2011
Version 2.1 (September 2016)

(This qualification is now closed for registrations, any new candidates from 1 September 2016 should be registered under 4427-30 SVQ in Customer Service at SCQF level 6)

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City & Guilds

1 Giltspur Street

London EC1A 9DD

F +44 (0)20 7294 2413

www.cityandguilds.com

centresupport@cityandguilds.com

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1 Introduction

This document contains the information that centres need to offer the following qualification:

Qualification title and level	SVQ3 in Customer Service at SCQF Level 6
City & Guilds qualification number	4427-03
Qualification accreditation number	GA4H 23
Last registration date	See Online Catalogue/Walled Garden for last dates
Last certification date	See Online Catalogue/Walled Garden for last dates

The level 3 City & Guilds SVQ in Customer Service qualification aims to provide opportunities to demonstrate understanding of customer service as a competitive tool and to be proactive in finding solutions both within and externally to their organisation. Candidates are likely to have significant responsibility for the delivery of both internal and external customer service within their team or organisation. Candidates will demonstrate their ability to analyse and respond to customers on a strategic level, suggesting improvements and leading in their implementation, using software solutions as appropriate.

Contacting the Sector Skills Body (SSB)

The Council for Administration (CFA)

Tel: 020 7091 9620

Website: www.cfa.uk.com

The Institute of Customer Service (ICS)

Tel: 01206 571 716

Fax: 01206 546 688

Website: www.instituteofcustomerservice.com

Version and date	Change detail	Section
Version 2.1 (September 2016)	Note added on front page to refer centres to 4427-30	Front page

1.1 Qualification structure

To achieve the **SVQ3 in Customer Service at SCQF Level 6**, learners must achieve:

Minimum of 7 units of which:

Two units must be completed from **Group A: Mandatory Core Units**

One unit must be selected from **Group B: Optional Units**

One unit must be selected from **Group C: Optional Units**

One unit must be selected from **Group D: Optional Units**

One unit must be selected from **Group E: Optional Units**

One further unit can be selected from any of **Groups B, C, D and E**

At least **five units** must be at **Level 6**

Only one unit can be selected from the **Optional Units** at **Level 7 or 8**

The table below illustrates the unit titles and the credit value of each unit the qualification will be awarded to candidates successfully completing the required combination of units.

City & Guilds unit number	Group A Mandatory Units – Customer Service Foundations	SCQF Level	SCQF Credit
4427-301	Demonstrate understanding of customer service (F3)	7	6
4427-302	Demonstrate understanding of the rules that impact on improvements in customer service (F4)	6	6
City & Guilds unit number	Group B Optional Units – Impression and Image	SCQF Level	SCQF Credit
4427-303	Deal with customers in writing or electronically (A13)	6	6
4427-304	Use customer service as a competitive tool (A14)	7	8
4427-305	Organise the promotion of additional services or products to customers (A15)	6	7
4427-306	Build a customer service knowledge set (A16)	7	7
City & Guilds unit number	Group C Optional Units – Delivery	SCQF Level	SCQF Credit
4427-307	Deliver customer service using service partnerships (B9)	6	6
4427-308	Organise the delivery of reliable customer service (B10)	6	6
4427-309	Improve the customer relationship (B11)	6	7
City & Guilds unit number	Group D Optional Units – Handling Problems	SCQF Level	SCQF Credit
4427-310	Monitor and solve customer service problems (C5)	6	6
4427-311	Apply risk assessment to customer service (C6)	7	10
4427-312	Process customer service complaints (C7)	7	6
City & Guilds unit number	Group E Optional Units – Development and Improvement	SCQF Level	SCQF Credit
4427-313	Work with others to improve customer service (D8)	6	8
4427-314	Promote continuous improvement (D9)	7	7
4427-315	Develop your own and others' customer service skills (D10)	6	8
4427-316	Lead a team to improve customer service (D11)	7	7
4427-317	Gather, analyse and interpret customer feedback (D12)	7	10
4427-318	Monitor the quality of customer service transactions (D13)	6	7
4427-411	Implement quality improvements to customer service (D14)	8	10
4427-412	Plan and organise the development of customer service staff (D15)	8	9
4427-413	Develop a customer service strategy for a part of an organisation (D16)	8	11
4427-414	Manage a customer service award programme (D17)	8	7
4427-415	Apply technology or other resources to improve customer service (D18)	8	11
4427-416	Review and re-engineer customer service processes (D19)	8	11
4427-417	Manage customer service performance (D20)	7	7

1.2 Opportunities for progression

On completion of this qualification candidates may progress into employment or to the following City & Guilds qualifications:

- Level 4 SVQ in Customer Service
- Level 3 Certificate in Customer Service
- Customer Service Advanced Apprenticeship
- SVQs in other work-related areas (for example Administration and other technical sectors)
- Institute of Leadership and Management (ILM) qualifications

1.3 Qualification support materials

City & Guilds also provides the following publications and resources specifically for this qualification:

Description	How to access
Generic candidate recording forms	www.cityandguilds.com
Centre guide	www.cityandguilds.com
Promotional materials	www.cityandguilds.com
SmartScreen	www.smartscreen.co.uk

2 Centre requirements

This section outlines the approval processes for Centres to offer this qualification and any resources that Centres will need in place to offer the qualifications including qualification-specific requirements for Centre staff.

Centres already offering City & Guilds qualifications in this subject area

Centres approved to offer the qualification Level 3 SVQ in Customer Service (4543-03) will be given automatic approval for the new Level 3 SVQ in Customer Service (4427-03). Existing sanctions will apply to the new qualifications.

Centres not already offering City & Guilds qualifications in this subject area

To offer these qualifications, centres already approved to deliver City & Guilds qualifications will need to gain **qualification approval**. Please refer to Appendix 1 for further information.

Centres not yet approved by City & Guilds

To offer these qualifications, new centres will need to gain both **centre and qualification approval**. Please refer to Appendix 1 for further information.

2.1 Resource requirements

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but must never internally verify their own assessments.

Assessors, internal verifiers and external verifiers

Centre staff should hold, or be working towards, the relevant Assessor/Verifier (A/V) units for their role in delivering, assessing and verifying this qualification. They must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- have a thorough knowledge of the Level 3 National Occupational Standards for Customer Service, appropriate to the Level they are working at, and the ability to interpret them across a wide variety of Customer Service environments
- experience and working knowledge of the operational and assessment processes of the Customer Service SVQ at the Level they are working at
- relevant and credible customer service experience across the level and breadth of the National Occupational Standards and SVQs at the Level they are working at
- knowledge of current customer service practice and emerging issues in the customer service arena
- high levels of communication and interpersonal skills.

The Assessor, IV and EV working at Level 3 must have:	This can be evidenced by:	A	IV	EV
A thorough understanding of the National Occupational Standards in Customer Service at Level 3 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
	explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓

Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Organisations/Bodies ,UKCES, Accreditation Bodies and the CFA		✓	✓
	explaining the differences between the 4 UK Countries	✓	✓	✓
Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
	attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
	reading Customer Service publications and articles	✓	✓	✓
	regularly looking at the CFA Website for new developments	✓	✓	✓
	keeping up to date with media news regarding Customer Service	✓	✓	✓
	joining the CFA	✓	✓	✓
Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service S/SVQ Level 3	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
	achieving or be working towards the Level 2, 3 or 4 Customer Service S/SVQ	✓	✓	✓
Sufficient, relevant and credible Customer Service experience across the level and breadth of the Standards and S/SVQs at Level 3	gathering feedback from a variety of employers and centres	✓	✓	✓
	curriculum vitae and references/testimonies	✓	✓	✓
Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVs and within 12 months for EVs. In Scotland all assessors and verifiers should provide evidence of CPD to show that they are working to the A and/or V unit standards where appropriate; those not yet qualified should show that they are working towards achieving the appropriate units.	producing certificates or evidence of working towards these units or by taking part in a Employer Direct Model in partnership with an Awarding Organisation/Body	✓	✓	✓
Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

Employer Direct Model

The CFA feels that the Employer Direct Model of in-house assessment will encourage more employers to offer the Customer Service SVQs and SVQs, particularly when they often have highly trained and experienced assessors, managers and trainers already in situ who meet or exceed the requirements of the A1 and V1 qualifications. Wherever possible, the CFA works with employers to encourage assessment to be carried out by colleagues, supervisors and/or managers in a workplace environment. However, many employers see gaining the A1 and V1 units as an obstacle and unnecessary given the experience and quality of their own internal assessors and trainers.

The Employer Direct Model has been developed to meet the needs of specific employers based on their knowledge of the Customer Service NOS and qualifications and their history of internal assessor/internal verifier expertise.

The organisation must:

- liaise with City & Guilds to attain approval to offer this model prior to beginning the process
- prepare, validate and review the assessment/verification roles
- carry out 100% mapping of the employers training to the National Occupational Standards for the A and V units which the qualifications are based on
- agree the mapping process with City & Guilds
- demonstrate an equivalent level of rigour and robustness as the achievement of the unit qualification

Continuing professional development (CPD)

Centres are expected to support their staff in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

2.2 Candidate entry requirements

Candidates should not be entered for a qualification of the same type, content and level as that of a qualification they already hold.

There are no formal entry requirements for candidates undertaking this qualification. However, centres must ensure that candidates have the potential and opportunity to gain the qualification successfully.

Level 3 units

Assessment of the Level 3 SVQ in Customer Service Units should be carried out in a **real job (either paid or voluntary)**. Simulation and Realistic Working Environment is not accepted at this level by the CFA Assessment Strategy.

Level 2 units

Wherever possible, assessment of the Customer Service National SVQ Units should be carried out in a **real job (either paid or voluntary)**. Where this is not possible this the CFA Assessment Strategy does allow for:

Realistic Working Environment (RWE)

The use of a Realistic Working Environment including work experience and work placement is allowed for all Level 2 units in SVQ.

It is essential that organisations wishing to operate a Realistic Working Environment (RWE) operate in an environment which reflects a real work setting. This will ensure that any competence achieved in this way will be sustained in real employment.

To undertake the assessment in a RWE the following guidelines must be met:

- a assessments must be carried out under realistic business pressures, using real customers and within a defined service offer
- b all services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations
- c candidates must be expected to achieve a volume of work comparable to normal business practices

- d the range of services, products, tools, materials and equipment that the candidates use must be up to date and available. They must enable candidates to meet the requirements of the National Occupational Standards
- e account must be taken of any legislation or regulations in relation to the type of work that is being carried out
- f candidates must be given workplace responsibilities to enable them to meet the requirements of the Customer Service National Occupational Standards at the relevant level
- g candidates must show that their productivity reflects those found in the work situation being represented

All other Units must be achieved in a **real working situation (either paid or voluntary)**

Age restrictions

This qualification is not approved for use by candidates under the age of 16 and City & Guilds cannot accept any registrations for candidates in this age group.

There are no other age limits attached to candidates undertaking this qualification unless it is a legal requirement of the process or the environment.

3 Course design and delivery

3.1 Initial assessment and induction

Centres will need to make an initial assessment of each candidate prior to the start of their programme to ensure they are entered for an appropriate type and level of qualification.

The initial assessment should identify:

- any specific training needs the candidate has, and the support and guidance they may require when working towards their qualification. This is sometimes referred to as diagnostic testing.
- any units the candidate has already completed, or credit they have accumulated which is relevant to the qualification they are about to begin.

City & Guilds recommends that centres provide an induction programme to ensure the candidate fully understands the requirements of the qualification they will work towards, their responsibilities as a candidate, and the responsibilities of the centre. It may be helpful to record the information on a learning contract.

3.2 Recommended delivery strategies

Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualification before designing a course programme.

Centres may design course programmes of study in any way which:

- best meets the needs and capabilities of their candidates
- satisfies the requirements of the qualification.

When designing and delivering the course programme, centres might wish to incorporate other teaching and learning that is not assessed as part of the qualification. This might include the following:

- literacy, language and/or numeracy
- personal learning and thinking
- personal and social development
- employability

Where applicable, this could involve enabling the candidate to access relevant qualifications covering these skills.

For further information to assist with the planning and development of the programme, please refer to the following:

- Evidence requirements in each Customer Service unit
- Useful material is available on SmartScreen www.smartscreen.co.uk
- Useful material is available from www.cfa.uk.com

4 Assessment

4.1 Summary of assessment methods

For this qualification, candidates will be required to complete the following assessment:

- a portfolio of evidence which covers the assessment criteria for each unit or combination of units as applicable to the qualification being undertaken

Time constraints

The following time constraint must be applied to the assessment of this qualification:

- Assessment must be completed within the candidate's period of registration.

4.2 Evidence requirements

- Evidence requirements are included as part of the unit content in this document.

4.3 Recording forms

Candidates and centres may decide to use a paper-based or electronic method of recording evidence.

City & Guilds has developed a set of *Recording forms* including examples of completed forms, for new and existing centres to use as appropriate.

4.4 Recognition of prior learning (RPL)

Recognition of Prior Learning (RPL) recognises the contribution a person's previous experience could contribute to a qualification.

RPL is allowed for this qualification and is not sector specific

This qualification is subject to an assessment strategy produced by the CFA August 2011 and can be located on their website **www.cfa.uk.com**

5 National Occupational Standards (NOS)

Availability of units

The Customer Service units for this qualification follow.

Structure of units

The units in this qualification are written in a standard format and comprise the following:

- City & Guilds reference number
- title
- level
- unit aim

Unit 301

Demonstrate understanding of customer service (F3)

Level: 7

Credit value: 6

This unit is part of the Customer Service Theme of Customer Service Foundations. The theme covers the language and concepts of customer service as well as the organisational context and the external environment in which you work. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Industries and organisations have developed a language and approach for customer service that is recognised and understood as the basis for service excellence. You need to understand and apply this language and approach if you are to become a true customer service professional. This unit is about being able to understand and explain the principles of customer service and the way they can be applied in specific customer service situations. The basic principles in this unit influence all aspects of making customer service work and enable you to place professional customer practice in the context of your industry sector and your own organisation. Above all, working as a customer service professional involves working with colleagues to develop a deeper and broader understanding of customer service language and principles.

Outcomes of effective performance

When you demonstrate understanding of customer service you must consistently:

1 Use accepted customer service language

- 1a. communicate to customers your organisation's service offer, how it balances organisational and customer needs and how it meets customer expectations
- 1b. compare the service offers of commercial, public sector and third sector organisations and how they each meet customer expectations
- 1c. discuss with colleagues steps that team members can take to deal with different customers and different customer service situations.

2 Apply customer service principles in your customer service role

- 2a. follow the key policies and procedures in your organisation for the delivery of services or products
- 2b. demonstrate an awareness of how your organisation's service approach and service offer fit within your own industry and differ from those of other industries
- 2c. discuss with colleagues how your organisation's ethical and value base fits with organisational needs and customer expectations.

Knowledge and understanding

To be competent at demonstrating understanding of customer service you must know and understand:

- a. how your organisation's service offer meets customer expectations
- b. how your organisation's service offer is affected by financial and other resource limitations
- c. the impact that your organisation's service offer may have on different people in the service chain
- d. how customers form their expectations of the services or products
- e. the importance of effective teamwork for the delivery of excellent customer service
- f. how customer service can contribute to best value in a public sector or third sector organisation
- g. how customer service can provide a competitive advantage for a commercial organisation
- h. why your organisation must limit the customer service it gives to balance customer satisfaction with organisational goals
- i. how you deal with different customer behaviours and personalities to achieve customer satisfaction
- j. the importance of effective communication in the delivery of excellent customer service
- k. how you ensure your communication with diverse groups of customers is effective and efficient
- l. the importance of continuous improvement within customer service
- m. the key policies and procedures in your organisation for the delivery of services or products and why it is important to follow them
- n. how your industry's approach to customer service differs from the approach of one other industry
- o. the service offer of competitors of your organisation or any organisations offering similar services or products
- p. the features and benefits of your organisation's services or products that influence customer service delivery and customer satisfaction
- q. how your organisation balances its needs with customer expectations and needs
- r. the ethical and value base of your organisation's approach to customer service
- s. how your behaviour when improving customer service delivery, affects the success of any changes.

Unit 302

Demonstrate understanding of the rules that impact on improvements in customer service (F4)

Level: 6

Credit value: 6

This unit is part of the Customer Service Theme of Customer Service Foundations. The theme covers the language and concepts of customer service as well as the organisational context and the external environment in which you work. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

The job of a customer service professional is to develop and improve customer service. However, this must be done within a framework of organisational procedures, regulation and legislation. Some of this framework applies only to your organisation, some applies to your industry sector and some is based on national regulation and legislation. This unit is about the rules, regulation and legislation that can impact on the way you develop and improve customer service. It requires you to demonstrate that you follow those rules when taking actions to improve customer service.

Outcomes of effective performance

When you demonstrate understanding of the rules that impact on improvements in customer service you must consistently:

- 1 Demonstrate understanding of the organisational rules and procedures that impact on customer service improvements**
 - 1a. identify organisational policies, procedures and practices that may impact on proposed improvements in customer service
 - 1b. demonstrate an awareness of the procedures and actions needed to secure approval for proposed improvements in customer service
 - 1c. agree with colleagues or service partners the actions needed to meet organisational requirements when implementing proposed customer service improvements.

- 2 Demonstrate an understanding of the legislation and external regulation that impact on customer service improvements**
 - 2a. identify relevant customer related legislation and external legislation that may affect the implementation of customer service improvements
 - 2b. identify relevant general business legislation and external regulation that may affect the implementation of customer service improvements
 - 2c. balance the requirements of legislation and external regulation with the needs of the organisation when implementing customer service improvements.

Knowledge and understanding

To be competent at demonstrating understanding of the rules that impact on improvements in customer service you must know and understand:

- a. organisational policies, procedures and practices that you need to take into account when you propose improvements in customer service
- b. how you gain approval to change customer service procedures or practices
- c. the limits of your own authority and who else in the organisation needs to be involved if you cannot authorise improvements alone
- d. how you would involve colleagues or service partners in the implementation of improvements
- e. relevant legislation and external regulation relating to consumer protection
- f. relevant legislation and external regulation relating to data protection
- g. relevant legislation and external regulation relating to disability discrimination and equal opportunities
- h. relevant legislation and external regulation relating to diversity, inclusion and discrimination for reasons other than disability or equal opportunities
- i. relevant legislation and external regulation relating to health and safety of customers and colleagues
- j. the need to balance the requirements of legislation and external regulation with the needs and objectives of your organisation
- k. legislation and external regulation that affect customer service in your industry in particular.

Unit 303

Deal with customers in writing or electronically (A13)

Level: 6
Credit value: 6

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Some customer service delivery involves communicating with your customer in a way that creates a permanent record either in writing or electronically. This form of communication carries risks and implications that are less likely to apply to a conversation held with your customer face to face or on the telephone. This unit is all about how written or electronic communication can be made effective and can contribute to excellent customer service.

Outcomes of effective performance

When you deal with customers in writing or electronically you must consistently:

1 Use written or electronic communication effectively

- 1a. operate equipment used to communicate in writing or electronically efficiently and effectively
- 1b. ensure that the period of time between exchanges in writing or electronically represents excellent customer service
- 1c. use language that is clear and concise
- 1d. adapt your use of language to meet the individual needs of your customer
- 1e. ensure that the style and tone of your written, or electronic communication, follows your organisation's guidelines and matches the service offer.

2 Plan and send an effective written or electronic communication

- 2a. anticipate your customer's expectations taking account of any previous exchanges you may have had
- 2b. assemble all the information you need to construct the communication
- 2c. plan the objective of your communication
- 2d. format your communication following your organisation's guidelines
- 2e. open the communication positively to establish a rapport with your customer
- 2f. ensure that your customer is aware of the purpose of the communication as early as possible
- 2g. summarise the key point of the communication and any actions that you or your customer will take as a result.

3 Handle incoming written or electronic communications effectively

- 3a. read your customer's communication carefully to identify their precise reason for contacting you
- 3b. identify what they are seeking as the outcome of the contact
- 3c. identify all the options you have for responding to your customer and weigh up the benefits and drawbacks of each
- 3d. choose the option that is most likely to lead to customer satisfaction within the service offer
- 3e. summarise the outcome of the communication and any actions that you or your customer will take as a result.

Knowledge and understanding

To be competent at dealing with customers in writing or electronically you must know and understand:

- a. the importance of using clear and concise language
- b. the additional significance and potential risks involved in committing a communication to a permanent record format
- c. the effects of style and tone on the reader of a written or electronic communication
- d. the importance of adapting your language to meet the needs of customers who may find the communication hard to understand
- e. your organisation's guidelines and procedures relating to written and electronic communication
- f. how to operate equipment used for producing and sending written or electronic communications
- g. the importance of keeping your customer informed if there is likely to be any delay in responding to a communication
- h. the risks associated with the confidentiality of written or electronic communications.

Unit 304

Use customer service as a competitive tool (A14)

Level: 7
Credit value: 8

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Customer service contributes to an organisation's competitive position. Customers of many organisations have choice about the services or products they use and who supplies them. Often the technical features and cost of the service or product are almost identical. If this is the case, the quality of the customer service offered makes all the difference about which supplier the customer chooses. This unit is about how you can play your part in ensuring that your organisation makes the best possible use of the competitive advantage that can be gained from offering superior customer service. It covers how you use customer service as a tool to compete effectively with other providers of similar services and products. The unit is not for you if your organisation does not compete actively with others.

Outcomes of effective performance

When you use customer service as a competitive tool you must consistently:

1 Organise customer service to gain a competitive advantage

- 1a. develop your own and colleagues' understanding of the services and products offered by your organisation
- 1b. define your organisation's service offer and the ways in which it compares with those of your competitors
- 1c. set an example for colleagues and present an image to your customers that reinforces your organisation's service offer
- 1d. encourage customer service actions that create and develop customer loyalty.

2 Deliver a competitive service

- 2a. take positive actions and encourage colleagues to take actions that provide individual customers with added value within your organisation's service offer
- 2b. remind your customers about your service offer and the extra benefit it provides over those of your competitors
- 2c. offer additional technical advice to customers within your organisation's service offer
- 2d. show awareness of the financial implications of any added value actions that you or your colleagues might offer
- 2e. meet customer service targets to ensure that your customers see the benefit of dealing with you rather than with a competitor
- 2f. re-direct customers to other service providers without offence when their expectations cannot be met by your organisation's service offer
- 2g. ensure that customers who have shown a previous interest in repeat and additional services are reminded of this
- 2h. encourage colleagues to offer complementary services and products when customer satisfaction indicates that your customers would be interested in them.

Knowledge and understanding

To be competent at using customer service as a competitive tool you must know and understand:

- a. the factors that lead to customers' belief that they are enjoying value for money
- b. the services and products offered by your organisation
- c. the services and products offered by competitors
- d. features and benefits of services and products that are seen by customers as added value
- e. the purpose of adding non-chargeable items to the service offer in order to impress customers and develop customer loyalty
- f. how to portray a positive image that reinforces your organisation's competitive position
- g. your organisation's customer service targets and cost implications of added value actions to improve the organisation's competitive position
- h. complementary services and products that may be of interest to your customers.

Unit 305

Organise the promotion of additional services or products to customers (A15)

Level: 6
Credit value: 7

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

This unit is about expanding and extending the relationship with your customers by persuading them to make use of additional services and products that you can offer. Your services or products will remain viable only if they are used by customers. The unit covers the way you organise customer service to promote additional use of your services or products by communicating with customers and then delivering those services or products effectively. It is also about monitoring your successes and failures and recognising the best way to approach your customers with additional services or products for the future. You need to show that you are promoting the services or products by encouraging more people to use them.

Outcomes of effective performance

When you organise the promotion of additional services or products to customers you must consistently:

1 Offer additional services or products

- 1a. offer additional services or products to your customers
- 1b. identify the benefits of offering additional services or products for your customers and the organisation
- 1c. explain the features and benefits of additional services or products to your customers
- 1d. identify ways of encouraging customers to ask about additional services or products.

2 Organise support to promote use of additional services or products

- 2a. discuss with others the ways of promoting additional services or products to your customers
- 2b. implement procedures to ensure that customers interested in additional services or products are dealt with promptly
- 2c. promote services or products which will suit your customers but are supplied from outside your own area of the organisation
- 2d. help customers to access services or products which are supplied outside of your own area of the organisation.

3 Monitor the promotion of additional services or products

- 3a. devise methods to inform customers about additional services or products
- 3b. use different methods to inform customers about additional services and products and record successes and failures against each method
- 3c. use your record of successes and failures to identify the best approach for offering additional services or products
- 3d. share information with others regarding the best approach to take when offering additional services or products to your customers.

Knowledge and understanding

To be competent at organising the promotion of additional services or products to customers you must know and understand:

- a. your organisation's procedures and systems for encouraging the use of additional services or products
- b. how the use of additional services or products will benefit your customers
- c. the main factors that influence customers to use your services or products
- d. how to introduce additional services or products to your customers, outlining their benefits, overcoming reservations and agreeing to provide the additional services or products
- e. how to give appropriate, balanced information to your customers about services or products.

Level: 7

Credit value: 7

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Effective and improving customer service may make use of a customer service knowledge set. This information base is built up continuously as the organisation learns from interaction with its customers. A knowledge set may contain a wide variety of information about customers and their transactions with the organisation. It will, in any case, rely on the actions of you and colleagues, in direct contact with customers, to build and grow as a useful customer service tool. This unit is all about actions you take to add to the information set and how you use it to develop the way you deal with customer transactions. This unit is for you only if your organisation has a systematic and technology supported approach to building a customer information set.

Outcomes of effective performance

When you build a customer service knowledge set you must consistently:

1 Input details of customer queries and requests and develop responses

- 1a. Identify, through active listening, customer queries and comments for inclusion in the knowledge set
- 1b. classify information, collected through customer contact, for inclusion in the knowledge set
- 1c. identify questions frequently asked by customers
- 1d. identify the broad customer service messages of your organisation's answers to frequently asked questions
- 1e. work with colleagues to develop responses to customer queries and requests
- 1f. contribute ideas and responses to the customer knowledge set which build on key organisational customer service messages
- 1g. check the effects of possible responses, included in the knowledge set, with customers during live customer service delivery or in trials
- 1h. monitor the customer service knowledge set to identify trends and patterns.

2 Use a customer service knowledge base

- 2a. access information from the customer service knowledge set using specific search criteria
- 2b. browse the customer service knowledge set to research a topic of interest or project area
- 2c. use the customer service knowledge set to inform the introduction of a new product or service variation
- 2d. use the customer service knowledge set to respond to a specific customer request or query
- 2e. assist a colleague to locate specific information in the customer service knowledge set
- 2f. add to the customer service knowledge set as a result of dealing with a customer request or query.

Knowledge and understanding

To be competent at building a customer service knowledge set you must know and understand:

- a. the structure and content of your organisation's customer service information set
- b. input and update routines for adding to the customer service knowledge set
- c. ways that information in a customer service knowledge set can be classified
- d. questions frequently asked by customers of your organisation
- e. the importance of working with colleagues to develop responses to customer requests and queries
- f. your organisation's key messages in relation to the services or products you are delivering
- g. ways to interpret information in a customer service knowledge set
- h. techniques for assisting a colleague to locate information in a customer service knowledge set.

Unit 307

Deliver customer service using service partnerships (B9)

Level: 6
Credit value: 6

This unit is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Excellent customer service relies on teamwork. In many situations, successful delivery of service to end user customers relies on a complete service chain of internal or external customers and internal or external suppliers. For this to work, a series of service partnerships must be formed which will enable the chain to work efficiently and effectively. This unit is all about how to work effectively within a service chain and how to develop the links that cement key relationships. Effective communication and understanding of the roles of different organisations, departments and individuals are central to this area of your work.

Outcomes of effective performance

When you deliver customer service using service partnerships you must consistently:

1 Work effectively within a customer service chain

- 1a. explain who is involved in the service chain that supplies your end user customers
- 1b. identify which of those involved in your service chain is internal and which is external to your organisation
- 1c. explain how the way you work with individual service partners contributes to an overall service chain
- 1d. use the principles and practices applied to external customers to deliver excellent customer service to internal customers
- 1e. work with internal customers and internal or external suppliers in the service chain to improve service to external customers
- 1f. communicate effectively with internal customers to ensure that they are aware of any aspects of your work that might affect them.

2 Build and nurture positive relationships in a customer service chain

- 2a. create a positive relationship between internal or external suppliers and customers by establishing rapport and showing understanding of everyone's roles in the service chain
- 2b. identify where power and authority exist within the service chain
- 2c. negotiate with internal customers and internal or external suppliers to establish service procedures that are acceptable to all and contribute to excellent customer service
- 2d. develop positive relationships with an internal customer or supplier that are reflected in a formal or informal service level agreement that makes a positive contribution to the relationship
- 2e. work with colleagues to develop and maintain awareness that a team within a service chain cannot work in isolation
- 2f. agree with service partners how your work will be prioritised if there is a conflict of interest between the demands of internal and external customers.

Knowledge and understanding

To be competent at delivering customer service using service partnerships you must know and understand:

- a. the responsibilities and rights that can be built into an internal customer/supplier relationship
- b. the benefits and drawbacks of describing a relationship in a service chain as a supplier/customer relationship or a service partnership
- c. how to establish priorities if internal customer demands conflict with external customer demands
- d. how to maintain team identity whilst working constructively with other teams to deliver excellent customer service
- e. how to negotiate successfully with internal customers or suppliers
- f. the formal and informal structures of the organisation and how they can influence relationships.

Unit 308

Organise the delivery of reliable customer service (B10)

Level: 6

Credit value: 6

This unit is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

This unit is about how you deliver and maintain excellent and reliable customer service. Your role may or may not involve supervisory or management responsibilities but you are expected to take some responsibility for the resources and systems you use which support the service that you give. In your job you must be alert to customer reactions and know how they can be used to improve the service that you give. In addition, customer service information must be recorded to support reliable service.

Outcomes of effective performance

When you organise the delivery of reliable customer service you must consistently:

1 Plan and organise the delivery of reliable customer service

- 1a. plan, prepare and organise everything you need to deliver services or products to different types of customers
- 1b. organise what you do to ensure that you are consistently able to give prompt attention to your customers
- 1c. reorganise your work to respond to unexpected additional workloads.

2 Review and maintain customer service delivery

- 2a. maintain service delivery during very busy periods and unusually quiet periods
- 2b. maintain service delivery when systems, people or resources have let you down
- 2c. consistently meet your customers' expectations
- 2d. balance the time you take with your customers with the demands of other customers seeking your attention
- 2e. respond appropriately to your customers when they make comments about the products or services you are offering
- 2f. alert others to repeated comments made by your customers
- 2g. take action to improve the reliability of your service based on customer comments
- 2h. monitor the action you have taken to identify improvements in the service you give to your customers.

3 Use recording systems to maintain reliable customer service

- 3a. record and store customer service information accurately following organisational guidelines
- 3b. select and retrieve customer service information that is relevant, sufficient and in an appropriate format
- 3c. quickly locate information that will help solve a customer's query
- 3d. supply accurate customer service information to others using the most appropriate method of communication.

Knowledge and understanding

To be competent at organising the delivery of reliable customer service you must know and understand:

- a. organisational procedures for unexpected situations and your role within them
- b. resource implications in times of staff sickness and holiday periods and your responsibility at these times
- c. the importance of having reliable and fast information for your customers and your organisation
- d. organisational procedures and systems for delivering customer service
- e. how to identify useful customer feedback and how to decide which feedback should be acted on
- f. how to communicate feedback from customers to others
- g. organisational procedures and systems for recording, storing, retrieving and supplying customer service information.
- h. legal and regulatory requirements regarding the storage of data.

Level: 6

Credit value: 7

This unit is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

To improve relationships with your customers you need to deliver consistent and reliable customer service. In addition, customers need to feel that you genuinely want to give them high levels of service and that you make every possible effort to meet or exceed their expectations. This encourages loyalty from external customers or longer-term service partnerships with internal customers. You need to be proactive in your dealings with your customers and to respond professionally in all situations. You need to negotiate between your customers and your organisation or department in order to find some way of meeting your customers' expectations. In addition you need to make extra efforts to delight your customers by exceeding their customer service expectations.

Outcomes of effective performance

When you improve the customer relationship you must consistently:

1 Improve communication with your customers

- 1a. select and use the best method of communication to meet your customers' expectations
- 1b. take the initiative to contact your customers to update them when things are not going to plan or when you require further information
- 1c. adapt your communication to respond to individual customers' feelings.

2 Balance the needs of your customer and your organisation

- 2a. meet your customers' expectations within your organisation's service offer
- 2b. explain the reasons to your customers sensitively and positively when their expectations cannot be met
- 2c. identify alternative solutions for your customers either within or outside the organisation
- 2d. identify the costs and benefits of these solutions to your organisation and to your customers
- 2e. negotiate and agree solutions with your customers which satisfy them and are acceptable to your organisation
- 2f. take action to satisfy your customers with the agreed solution when balancing their needs with those of your organisation.

3 Exceed customer expectations to develop the relationship

- 3a. make extra efforts to improve your relationship with your customers
- 3b. recognise opportunities to exceed your customers' expectations
- 3c. take action to exceed your customers' expectations within the limits of your own authority
- 3d. gain the help and support of others to exceed your customers' expectations.

Knowledge and understanding

To be competent at improving the customer relationship you must know and understand:

- a. how to make best use of the method of communication chosen for dealing with your customers
- b. how to negotiate effectively with your customers
- c. how to assess the costs and benefits to your customer and your organisation of any unusual agreement you make
- d. the importance of customer loyalty and/or improved internal customer relationships to your organisation.

Unit 310

Monitor and solve customer service problems (C5)

Level: 6

Credit value: 6

This unit is part of the Customer Service Theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Your job involves delivering and organising excellent customer service. However good the service provided, some of your customers will experience problems and you will spot and solve other problems before your customers even know about them. This unit is about the part of your job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems.

Remember that some customers judge the quality of your customer service by the way that you solve customer service problems. You can impress customers and build customer loyalty by sorting out those problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.

Outcomes of effective performance

When you monitor and solve customer service problems you must consistently:

1 Solve immediate customer service problems

- 1a. respond positively to customer service problems following organisational guidelines
- 1b. solve customer service problems when you have sufficient authority
- 1c. work with others to solve customer service problems
- 1d. keep customers informed of the actions being taken
- 1e. check with customers that they are comfortable with the actions being taken
- 1f. solve problems with service systems and procedures that might affect customers before they become aware of them
- 1g. inform managers and colleagues of the steps taken to solve specific problems.

2 Identify repeated customer service problems and options for solving them

- 2a. identify repeated customer service problems
- 2b. identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option
- 2c. work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of your organisation.

3 Take action to avoid the repetition of customer service problems

- 3a. obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated
- 3b. action your agreed solution
- 3c. keep your customers informed, in a positive and clear manner, of steps being taken to solve any service problems
- 3d. monitor the changes you have made and adjust them if appropriate.

Knowledge and understanding

To be competent at monitoring and solving customer service problems you must know and understand:

- a. organisational procedures and systems for dealing with customer service problems
- b. organisational procedures and systems for identifying repeated customer service problems
- c. how the successful resolution of customer service problems contributes to customer loyalty with the external customer, and improved working relationships with service partners or internal customers
- d. how to negotiate with and reassure customers while their problems are being solved.

Unit 311

Apply risk assessment to customer service (C6)

Level: 7
Credit value: 10

This unit is part of the Customer Service Theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

This unit is about how formal or informal risk assessment techniques can be used to reduce any risks involved in the provision of customer service. The provision of customer service involves a range of risks. These may be financial, reputational or health and safety risks. Awareness of them alone is rarely enough so customer service sometimes involves identifying and assessing individual risks so that they can be classified and prioritised. This in turn enables you to take actions to minimise risks.

Outcomes of effective performance

When you apply risk assessment to customer service you must consistently:

1 Analyse customer service processes for risk

- 1a. identify different steps and stages in the customer service process and the moments of truth that offer most opportunity to impress or to disappoint customers
- 1b. identify the financial risks for each stage of the customer service process
- 1c. identify the reputational risks for each stage of the customer service process
- 1d. identify the health and safety risks for each stage of the customer service process
- 1e. identify the risk of delivering sub-standard services or products for each stage of the customer service process
- 1f. ensure that your customers are aware of any risks that might impact on them
- 1g. develop staff awareness of the risks you have identified.

2 Assess customer service risks and take appropriate actions

- 2a. assess the probabilities of each risk that you have identified
- 2b. assess the consequence of each risk in terms of finance, reputation and health and safety
- 2c. classify each risk as high, medium or low taking into account its probability and consequences
- 2d. work with colleagues to identify any actions that might be taken to reduce risk
- 2e. take appropriate actions to minimise the overall customer service risk profile by adapting procedures.

Knowledge and understanding

To be competent at applying risk assessment to customer service you must know and understand:

- a. your organisation's customer service process and the moments of truth (those points in the customer service process that have most impact on the customer experience)
- b. risk assessment techniques
- c. how to evaluate risk according to probability of occurrence and consequences of occurrence
- d. the nature of potential customer service risks including financial, reputational and health and safety risks
- e. cost/benefit analysis
- f. SWOT (Strengths, Weaknesses, Opportunities, Threats) and PESTLE (Political, Economic, Social, Technological, Legal, Environmental) analysis.

Level: 7
Credit value: 10

This unit is part of the Customer Service Theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

This unit is about the process of handling complaints. In any customer service situation a customer who is not satisfied may resort to making a complaint. Complaints may be justified or unjustified but in either case your customer expects you to respond and to offer some resolution or compensation. Complaints require investigation and the different options for their resolution to be considered. Your organisation may have detailed and formal procedures for dealing with complaints.

Outcomes of effective performance

When you process customer service complaints you must consistently:

1 Recognise the signs that a query or problem is about to produce a complaint

- 1a. identify signs that a customer is becoming dissatisfied with the customer service of your organisation
- 1b. take action to change the situation so that the query or problem does not result in a complaint
- 1c. take actions to change your customer service approach in order to avoid future complaints when a justified complaint has been made.

2 Deal with a complaint effectively

- 2a. ensure that you have a clear understanding of the nature and details of the complaint
- 2b. investigate the facts of the complaint in order to establish whether it should be dealt with as a justified complaint or an unjustified complaint
- 2c. identify all the possible options for a solution and consider the benefits and drawbacks of each option for your customer and for your organisation
- 2d. assess the risks to your organisation of choosing each option
- 2e. report the findings of your investigation to your customer and offer your chosen solution
- 2f. escalate the complaint by involving more senior members of your organisation, or an independent third party, if there is sufficient reason to do so
- 2g. give feedback to other colleagues involved, which will help them avoid future complaints
- 2h. keep clear records of the way the complaint has been handled to avoid later misunderstandings.

Knowledge and understanding

To be competent at processing customer service complaints you must know and understand:

- a. how to monitor the level of complaints and identify those that should provoke a special review of the service offer and service delivery
- b. why dealing with complaints is an inevitable part of delivering customer service
- c. organisational procedures for dealing with complaints
- d. how to negotiate a solution with your customer that is acceptable to that customer and to the organisation
- e. the regulatory definition of a complaint in your sector and the regulatory requirements of how complaints should be handled and reported
- f. when to escalate a complaint by involving more senior members of the organisation or an independent third party
- g. the cost and regulatory implications of admitting liability for an error made by your organisation
- h. how to spot and interpret signals that your customer may be considering making a complaint
- i. techniques for handling conflict
- j. the importance of dealing with a complaint promptly
- k. why the offer of compensation or replacement service or products may not always be the best options for resolving a complaint
- l. how the successful handling of a complaint presents an opportunity to impress a customer who has been dissatisfied.

Unit 313

Work with others to improve customer service (D8)

Level: 6
Credit value: 8

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Teamwork is a key component of delivering and improving excellent customer service. The people you work with to improve customer service may include one or more of the following: team members; colleagues; suppliers; service partners; supervisors; managers; team leaders. The delivery of excellent customer service depends on your skills and those of others. It involves communicating with each other and agreeing how you can work together to give a more effective service. You need to work together positively. You must also monitor your own and the team's performance and change the way you do things if that improves customer service. This unit is about how you develop a relationship with others to improve your customer service performance.

Outcomes of effective performance

When you work with others to improve customer service you must consistently:

1 Improve customer service by working with others

- 1a. contribute constructive ideas for improving customer service
- 1b. identify what you have to do to improve customer service and confirm this with others
- 1c. agree with others what they have to do to improve customer service
- 1d. co-operate with others to improve customer service
- 1e. keep your commitments made to others
- 1f. make others aware of anything that may affect plans to improve customer service.

2 Monitor your own performance when improving customer service

- 2a. discuss with others how what you do affects customer service performance
- 2b. identify how the way you work with others contributes towards improving customer service.

3 Monitor team performance when improving customer service

- 3a. discuss with others how teamwork affects customer service performance
- 3b. work with others to collect information on team customer service performance
- 3c. identify with others how customer service teamwork could be improved
- 3d. take action with others to improve customer service performance.

Knowledge and understanding

To be competent at working with others to improve customer service you must know and understand:

- a. who else is involved either directly or indirectly in the delivery of customer service
- b. the roles and responsibilities of others in your organisation
- c. the roles of others outside your organisation who have an impact on your services or products
- d. what the goals or targets of your organisation are in relation to customer service, and how these are set
- e. how your organisation identifies improvements in customer service.

Level: 6

Credit value: 8

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

This unit covers the key competence of the customer service professional. You must be dedicated to the continuous improvement of customer service and this involves organising changes in the way customer service is delivered over and over again. You need to identify potential changes, think through their consequences and make them work. Above all, this unit covers the competence of organising and seeing through change that is sustainable and is in the spirit of continuous improvement in customer service.

Outcomes of effective performance

When you promote continuous improvement you must consistently:

1 Plan improvements in customer service based on customer feedback

- 1a. gather feedback from customers that will help to identify opportunities for customer service improvement
- 1b. analyse and interpret feedback to identify opportunities for customer service improvements and propose changes
- 1c. discuss with others the potential effects of any proposed changes for your customers and your organisation
- 1d. negotiate changes in customer service systems and improvements with somebody with sufficient authority to approve trial or full implementation of the change.

2 Implement changes in customer service

- 2a. organise the implementation of authorised changes
- 2b. implement the changes following organisational guidelines
- 2c. inform people inside and outside your organisation who need to know of the changes being made and the reasons for them
- 2d. monitor early reactions to changes and make appropriate fine-tuning adjustments.

3 Review changes to promote continuous improvement

- 3a. collect and record feedback on the effects of changes
- 3b. analyse and interpret feedback and share your findings on the effects of changes with others
- 3c. summarise the advantages and disadvantages of the changes
- 3d. use your analysis and interpretation of changes to identify opportunities for further improvement
- 3e. present these opportunities to somebody with sufficient authority to make them happen.

Knowledge and understanding

To be competent at promoting continuous improvement you must know and understand:

- a. how service improvements in your area affect the balance between overall customer satisfaction, the costs of providing service and regulatory requirements
- b. how customer experience is influenced by the way service is delivered
- c. how to collect, analyse and present customer feedback
- d. how to make a business case to others to bring about change in the products or services you offer.

Unit 315

Develop your own and others' customer service skills (D10)

Level: 6
Credit value: 8

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

This unit is about taking responsibility for continuously developing your own customer service skills and passing those skills on to others. It is about helping yourself and others to learn and grow in your customer service roles. You may not be a manager or a supervisor but you may be responsible for showing others how things work and what they need to do. For example a new member of staff may need an introduction to the products, services, systems or procedures of your organisation and you may be asked to show them. Or you may need to coach someone from another department who has been transferred. Also, there may be the introduction of a new product, service, system or procedure that you are asked to learn about and present or demonstrate to others. This unit will help you to put 'showing others' into a formal framework that will help them to learn and improve your own coaching skills. The delivery of excellent customer service depends on your skills and the skills of those around you.

Outcomes of effective performance

When you develop your own and others' customer service skills you must consistently:

1 Develop your own customer service skills

- 1a. agree with a manager or mentor the specific customer service skills you need in your customer service role
- 1b. agree the actions you need to take to improve your customer service skills
- 1c. draw up a personal development plan based on your agreed actions to improve your customer service skills
- 1d. carry out your personal development activities and review your progress
- 1e. obtain feedback from your manager or mentor about your customer service performance and update your personal development plan.

2 Plan the coaching of others in customer service

- 2a. identify and agree with colleagues specific customer service skills and knowledge they need in their customer service role
- 2b. identify opportunities for colleagues to take actions to develop their customer service skills
- 2c. plan and organise activities and coaching sessions for colleagues to help them develop their customer service skills.

3 Coach others in customer service

- 3a. coach colleagues to develop specific and agreed customer service skills
- 3b. give colleagues the opportunity to practise skills, apply knowledge and gain experience to develop customer service competence
- 3c. regularly check the progress of colleagues and modify your coaching as appropriate
- 3d. give regular feedback to colleagues about the progress they are making
- 3e. explain clearly to colleagues how ongoing support will be provided.

Knowledge and understanding

To be competent at developing your own and others' customer service skills you must know and understand:

- a. organisational systems and procedures for developing your own and others' personal performance in customer service
- b. how your behaviour impacts on others
- c. how to review effectively your personal strengths and development needs
- d. how to put together a personal development plan for yourself or a colleague that will build on strengths and overcome weaknesses in areas that are important to customer service
- e. how to obtain useful and constructive personal feedback from others
- f. how to respond positively to personal feedback
- g. how to put together a coaching plan that will build on the strengths of the learner and overcome their weaknesses in areas that are important to customer service and their job role
- h. how to give useful and constructive personal feedback to others
- i. how to help others to respond positively to personal feedback.

Unit 316

Lead a team to improve customer service (D11)

Level: 7
Credit value: 7

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

If you are responsible for leading a team delivering customer service, you need to plan and organise their work and support them as they develop their performance. This unit is about looking at both your organisation and your staffing resources and bringing these together in a constructive way to improve overall customer service.

You need to give support and guidance to your team to encourage them to improve their customer service delivery. It is about having a passion for customer service and sharing this enthusiasm with your colleagues and staff team. It is about leading by example.

Outcomes of effective performance

When you lead a team to improve customer service you must consistently:

1 Plan and organise the work of a team

- 1a. treat team members with respect at all times
- 1b. agree with team members their role in delivering effective customer service
- 1c. involve team members in planning and organising their customer service work
- 1d. allocate work which takes full account of team members' customer service skills and the objectives of the organisation
- 1e. motivate team members to work together to raise their customer service performance.

2 Provide support for team members

- 2a. check that team members understand what they have to do to improve their work with customers and why that is important
- 2b. check with team members what support they feel they may need throughout this process
- 2c. provide team members with support and direction when they need help
- 2d. encourage team members to work together to improve customer service.

3 Review performance of team members

- 3a. provide sensitive feedback to team members about their customer service performance
- 3b. encourage team members to discuss their customer service performance
- 3c. discuss, sensitively, with team members action they need to take to continue to improve their customer service performance.

Knowledge and understanding

To be competent at leading a team to improve customer service you must know and understand:

- a. the roles and responsibilities of your team members and where they fit in with the overall structure of the organisation
- b. how team and individual performance can affect the achievement of organisational objectives
- c. the implications of failure to improve customer service for your team members and your organisation
- d. how to plan work activities
- e. how to present plans to others to gain understanding and commitment
- f. how to facilitate meetings to encourage frank and open discussion
- g. how to involve and motivate staff to encourage teamwork
- h. how to recognise and deal sensitively with issues of underperformance.

Unit 317

Gather, analyse and interpret customer feedback (D12)

Level: 7
Credit value: 10

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Customer service can be improved only if you are fully aware of customer wishes and expectations. You can discover much of this information by seeking structured feedback from your customers about their experiences of your services or products. When the information has been collected it must be analysed and interpreted in order to use it for making customer service improvements. This unit is all about how you collect that feedback and prepare it for use in the improvement of customer service.

Outcomes of effective performance

When you gather, analyse and interpret customer feedback you must consistently:

1 Plan to gather customer feedback

- 1a. identify the options available for collecting customer service feedback
- 1b. evaluate the costs and benefits of each option for collecting customer feedback
- 1c. select one or more methods for collecting customer feedback
- 1d. plan, in detail, what information you will collect from customers
- 1e. ensure the information you collect all has a customer service focus
- 1f. plan, in detail, how you will collect information from customers using your chosen method.

2 Gather customer feedback

- 2a. use your chosen method and detailed plan to collect customer feedback
- 2b. monitor the collection of customer feedback to ensure it is falling within your chosen sampling frame
- 2c. monitor the collection of customer feedback to ensure it focuses on customer service issues
- 2d. record the data you collect in a way that makes analysis and interpretation easy
- 2e. respect your customers' rights to confidentiality if they do not want their comments to be identified.

3 Analyse and interpret customer feedback

- 3a. collate data collected from customers in order to identify patterns and trends in customer service
- 3b. perform appropriate calculations to summarise patterns and trends in the data
- 3c. present your analysis in a form that is easily understood
- 3d. link your analysis with your knowledge of your organisation's service offer and customer service processes in order to interpret the meaning of the data
- 3e. make recommendations for changes in your organisation's service offer or customer service processes in response to the views of your customers
- 3f. identify ways in which customer feedback can be used to inform customers and develop the customer relationship.

Knowledge and understanding

To be competent at gathering, analysing and interpreting customer feedback you must know and understand:

- a. random sampling techniques and how to evaluate bias in non-random samples
- b. principles of questionnaire design
- c. principles of effective interviewing
- d. how to calculate the cost of a customer survey
- e. techniques for monitoring data collection
- f. how to use appropriate software to record and analyse customer feedback
- g. methods of displaying and presenting data in a way that is easy to understand
- h. statistical techniques for summarising trends and patterns
- i. organisational procedures for recommending changes in the service offer or customer service procedures
- j. the advantages and disadvantages of collecting customer feedback through written questionnaires, by telephone, by interview, using focus groups or by internet or e-mail.

Unit 318

Monitor the quality of customer service transactions (D13)

Level: 6
Credit value: 7

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

The quality of customer service transactions must be monitored if they are to benefit from actions to improve that overall quality. Quality in this area can be defined only in terms of agreed criteria and against agreed performance ratings. In an organisation that carries out a high volume of customer service transactions delivered face-to-face, by telephone or on-line, quality can be measured and improved only by adopting a systematic sampling approach. Spot checks and routine checks are needed to observe individual performance and results must be analysed to identify patterns and trends. Improvement can then occur as a result of feedback you give to colleagues so that actions to improve individual performance can be taken. This unit is for you if one of your job responsibilities involves systematically sampling the quality of customer service transactions and working with colleagues to improve their performance.

Outcomes of effective performance

When you monitor the quality of customer service transactions you must consistently:

1 Prepare to monitor the quality of customer service transactions

- 1a. identify the criteria against which quality of customer service transactions will be monitored
- 1b. agree a sampling frame for monitoring customer service transactions
- 1c. follow organisational procedures to ensure your monitoring plans are compliant with any need for staff and customers to know they are being observed
- 1d. identify ratings and scales against which quality of customer service transactions can be measured
- 1e. ensure that you are totally familiar with the customer service procedures for transactions you are monitoring.

2 Monitor the quality of customer service transactions

- 2a. carry out spot checks on, or observations of, the quality of customer service transactions
- 2b. carry out planned and routine checks on, or observations of, the quality of customer service transactions
- 2c. observe or listen to a colleague dealing with a customer service transaction
- 2d. record your observations of a colleague's performance against agreed quality criteria
- 2e. make judgements about your colleague's quality of service delivery by allocating a performance rating against a defined and agreed rating scale
- 2f. analyse and summarise your observations to identify patterns and trends in your colleague's performance.

3 Give feedback on the quality of customer service transactions

- 3a. engage with your colleague in preparation for giving feedback on the quality of their customer service delivery
- 3b. provide positive feedback to your colleague by identifying features of customer service that they delivered particularly well
- 3c. give feedback to your colleague regarding features of their customer service delivery that would benefit from development
- 3d. propose actions for coaching or training of a colleague in areas that would improve their customer service delivery
- 3e. maintain records of customer service quality monitoring and action plans for improvements.

Knowledge and understanding

To be competent at monitoring the quality of customer service transactions you must know and understand:

- a. the criteria against which the quality of customer service delivery is judged in your organisation
- b. ways to construct a representative sample of customer service transactions in order to monitor quality
- c. the importance of compliance with guidelines about ensuring customers and colleagues know they are being observed to monitor quality of service
- d. ways to define ratings and scales against which customer service transactions can be judged
- e. your organisation's procedures and guidelines for customer service delivery
- f. ways to record details of customer service transactions you have observed in order to provide feedback
- g. techniques for analysing and summarising observations in order to identify patterns and trends in customer service delivery
- h. the importance of providing positive feedback to a colleague prior to identifying areas for improvement
- i. sources of information about coaching and training options to improve customer service delivery
- j. the importance of keeping detailed records of coaching and training relating to customer service delivery.

Unit 411

Implement quality improvements to customer service (D14)

Level: 8
Credit value: 10

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Introducing quality improvements to customer service requires careful management of change. This unit covers the detailed planning of customer service improvements, managing the changes that need to take place to implement the improvements, and then evaluating the results. It includes the consultation and communication processes that are vital to the successful implementation of improvements and management of change. In particular, it is vital to involve customers at all stages of the quality improvement process.

Outcomes of effective performance

When you implement quality improvements to customer service you must consistently:

1 Plan the introduction of customer service improvements

- 1a. identify possible customer service improvements and the resources available to implement them
- 1b. evaluate factors that may help or hinder the introduction of change
- 1c. develop realistic objectives, tasks and schedules for the introduction of improvements and agree them with colleagues
- 1d. assess the risks associated with each action to effect change
- 1e. plan how you will evaluate the proposed improvements.

2 Manage the implementation of customer service improvements

- 2a. inform the people who will be affected by change, win their support and keep them informed of progress
- 2b. implement your plans for improvements dealing effectively with any difficulties
- 2c. provide the necessary support to all your colleagues who are involved with changes and improvements
- 2d. ensure that the planned improvements are implemented on time and within budget.

3 Monitor and evaluate customer service improvements

- 3a. monitor and evaluate the impact that the changes are having on the quality of customer service
- 3b. identify and recommend any further changes that may be necessary to achieve the planned aims and objectives of the improvements
- 3c. identify any lessons from the change process and note these for future activities.

Knowledge and understanding

To be competent at implementing quality improvements to customer service you must know and understand:

- a. the importance of careful planning when introducing change
- b. the types of factors that may help or hinder the process of change and how to identify and plan for these
- c. how to develop plans that contain realistic objectives, tasks and schedules
- d. the importance of having clear lines of responsibility and accountability
- e. how to identify and plan for possible contingencies
- f. the importance of clear communication when changes are taking place
- g. why it is important to win the support of people who will be affected by change
- h. how to win over staff who are resistant to change
- i. the types of support that staff may need when improvements are being implemented and how to provide such support
- j. why it is important to complete change on time and within budget
- k. how to monitor and evaluate the impact of change
- l. why it is important to evaluate change and to note any lessons for future initiatives.

Unit 412

Plan and organise the development of customer service staff (D15)

Level: 8
Credit value: 9

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Achieving excellent customer service depends on the skills and knowledge of the staff who provide it. To be effective, organisations need to review constantly how effective their customer service is and what improvements should be made. Sometimes customer service improvements will depend on the development of staff skills. New staff must be brought to the required standards of skills and knowledge and established staff need to be updated on new procedures and techniques or refreshed on existing ones. Senior customer service staff have an important contribution to make to this process. This unit is about identifying what development and training is needed for staff, organising its delivery and monitoring its success.

Outcomes of effective performance

When you plan and organise the development of customer service staff you must consistently:

1 Identify customer service staff development and training needs

- 1a. identify where customer service could be improved through staff training and development
- 1b. help staff providing customer service to identify their own development and training needs
- 1c. help staff to identify how they learn best
- 1d. agree the types of staff development and training activities that are needed
- 1e. report staff development needs to relevant people in your organisation.

2 Organise customer service development and training

- 2a. agree the aims and objectives of the customer service development and training activities
- 2b. agree the type and style of customer service development and training that are appropriate
- 2c. agree the detailed design of customer service development and training activities
- 2d. organise customer service development and training activities
- 2e. monitor the performance of staff involved in the development and training activities to be sure that learning is put into practice
- 2f. organise additional help and training for staff where this is needed.

Knowledge and understanding

To be competent at planning and organising the development of customer service staff you must know and understand:

- a. the importance of continuously developing staff that provide customer service
- b. current objectives and targets that relate to customer service in your area of responsibility
- c. how to identify when development and training could improve customer service performance
- d. the range of types and styles of development and training and how to select those that are appropriate to customer service, your organisation, and specific training and development needs
- e. why it is important that you should have an input into the design and delivery of customer service development and training for your staff
- f. how you can help staff to put into practice what they have learned
- g. how to assess the impact that development and training has had on customer service performance
- h. the types of additional support you could provide to staff following development and training.

Unit 413

Develop a customer service strategy for a part of an organisation (D16)

Level: 8
Credit value: 11

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

If organisations want to be consistently successful in customer service over a period of time, they need a customer service strategy. Managers and other senior staff can contribute to this through their knowledge of the organisation's customers and their expertise in customer service. This contribution is also based on what they know of other organisations and published research into trends in customer service. This unit does not assume you have full responsibility for your organisation's customer service strategy but that you take a major role in the development of strategy for a particular part of your organisation.

Outcomes of effective performance

When you develop a customer service strategy for a part of an organisation you must consistently:

1 Research and evaluate your organisation's business and customer service strategy

- 1a. identify your organisation's values, aims and objectives
- 1b. identify the role of a given part of the organisation in achieving the strategy
- 1c. evaluate the implications of the strategy for customer service in this part of the organisation
- 1d. confirm the implications of the strategy for customer service with colleagues
- 1e. collect information on and analyse customer expectations
- 1f. match customer expectations with the customer service implications of the business strategy for a given part of your organisation.

2 Help to identify current and future best practice in customer service

- 2a. identify other organisations which represent models of good practice in customer service
- 2b. evaluate the key features of customer service in these organisations and the principles that underpin their approaches
- 2c. identify and analyse current research on trends and developments in customer service
- 2d. identify and analyse relevant legal and regulatory requirements, codes of practice and ethical considerations
- 2e. explore the implications of your research for the part of the organisation you are working in
- 2f. discuss the outcomes of your research with colleagues.

3 Identify and recommend the key features of a customer service strategy

- 3a. identify values, aims and objectives that are consistent with your research
- 3b. identify contact processes and channels for customer service that are consistent with your values, aims and objectives
- 3c. identify how you will evaluate the effectiveness of the strategy
- 3d. discuss with colleagues the key features of a customer service strategy
- 3e. construct a customer service strategy for the chosen part of the organisation and agree it with colleagues and managers.

Knowledge and understanding

To be competent at developing a customer service strategy for a part of an organisation you must know and understand:

- a. the importance of having a customer service strategy for a given part of the organisation
- b. how to access information on your organisation's overall business strategy and analyse its implications
- c. sources of information you can use to find out about your customers and their expectations
- d. the importance of customer loyalty and customer service practices that can help to retain loyalty
- e. how to identify other organisations which might represent models of best practice in customer service
- f. sources of research on trends and developments in customer service
- g. how to develop values, aims and objectives relevant to customer service
- h. procedures for making recommendations within your organisation.

Unit 414

Manage a customer service award programme (D17)

Level: 8
Credit value: 7

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

This unit is about the competences involved in managing a customer service award programme. A customer service award programme can make a valuable contribution to your organisation's customer service strategy. It serves the dual role of motivating team members and displaying to customers your commitment to customer service. Whilst such a programme must be managed like any other management project, its dual purpose means that each management action associated with it must take full account of the strategic customer service implications.

Outcomes of effective performance

When you manage a customer service award programme you must consistently:

1 Plan a customer service award programme

- 1a. identify all the possible options for a customer service award scheme drawing on examples inside and outside of your own organisation
- 1b. identify the benefits and drawbacks of each option for a customer service award programme
- 1c. choose the option for a customer service award programme that best suits your customer satisfaction and team motivation objectives
- 1d. plan the details of your chosen customer service award programme
- 1e. identify the benefits and costs of your chosen customer service award programme in relation to customer satisfaction and team motivation
- 1f. make a business case for the introduction of a customer service awards programme or for the development of an existing programme.

2 Implement and manage a customer service award programme

- 2a. launch developments in the customer service award programme in a way that informs and motivates customers and team members
- 2b. ensure that the criteria for the customer service awards are transparent and are considered fair by team members
- 2c. publicise the customer service awards programme to customers in a way that demonstrates organisational commitment to excellent customer service
- 2d. organise the judging of individual and team awards in a way that means the results can be justified to the organisation as a whole
- 2e. announce the results and present the awards in a manner that suits the culture of your organisation and customer service team
- 2f. review and evaluate the effects of the customer service awards programme on customers and team members.

Knowledge and understanding

To be competent at managing a customer service award programme you must know and understand:

- a. the principles of motivation and in particular the importance of recognition as a motivator
- b. how to make use of customer service award programmes as promotional tools to give added value to customer satisfaction
- c. the benefits and drawbacks of different rewards associated with award programmes.

Unit 415

Apply technology or other resources to improve customer service (D18)

Level: 8
Credit value: 11

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Customer service changes and improves sometimes through the application of technology or other resources as much as through changes in behaviour of those delivering the service. Whilst these changes can bring real benefits they inevitably come at an initial cost which must be taken into consideration. This unit is about the process of managing the application of technology or other resources to a customer service process. It involves a systematic approach to considering and evaluating options, implementing the most appropriate and reviewing the results.

Outcomes of effective performance

When you apply technology or other resources to improve customer service you must consistently:

1 Identify and specify opportunities for customer service improvement

- 1a. monitor developments in technology and the use of other resources to improve customer service
- 1b. review customer service delivery systems with specific reference to use of resources and technology
- 1c. identify opportunities and options for improving customer service by applying technology or other resources
- 1d. analyse the customer service benefits that could result from options for improvement
- 1e. specify the changes in technology or other resources needed to deliver the options.

2 Evaluate options for applying technology or other resources to improve customer service

- 2a. identify the options for improving customer service with the application of technology or other resources
- 2b. establish the costs associated with each option for improving customer service
- 2c. list and, where possible, quantify the benefits from each option for improving customer service
- 2d. estimate the affordability of each option to improve customer service
- 2e. recommend the most appropriate options for implementation
- 2f. identify the probable effects of any recommended changes on your organisation's service offer and customer perceptions
- 2g. plan a business case to support your recommendations for improvements through application of technology or other resources.

3 Oversee the implementation of resource changes to improve customer service

- 3a. plan implementation using details of agreed developments to improve customer service
- 3b. brief colleagues about the implementation of customer service improvements and the expected benefits
- 3c. monitor implementation of customer service improvements and the expected benefits
- 3d. review implementation of customer service improvements with colleagues
- 3e. make appropriate adjustments to implementation of customer service improvements as a result of review.

Knowledge and understanding

To be competent at applying technology or other resources to improve customer service you must know and understand:

- a. features and functionality of available technology that may contribute to improvements in customer service
- b. how the application of additional resources, other than technology, can be used to improve customer service
- c. methods for the systematic review of customer service systems
- d. techniques to analyse the costs and benefits of options for improving customer service
- e. methods for presenting a business case for applying technology or other resources to make improvements in customer service
- f. briefing techniques for introducing colleagues to changes
- g. ways to review and adjust customer service delivery after the implementation of changes.

Unit 416

Review and re-engineer customer service processes (D19)

Level: 8
Credit value: 11

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

From time to time, a customer process must be subject to review. Most of all, this is because both customer expectations and the general environment change. In addition to this, features of the process evolve as it is operated and the customer service purpose of various details can be lost. This unit is about a systematic approach to reviewing and re-engineering a customer service process. The review seeks a balance of customer satisfaction, cost awareness and compliance with regulation. The review must be undertaken with the agreement and support of those with authority to make changes. It must also take account of the views of those who deliver the process and are in direct contact with customers. This unit is for you if you are responsible for reviewing customer service processes. Do not use this unit if you do not hold that responsibility and do not have the support of those with authority to make changes.

Outcomes of effective performance

When you review and re-engineer customer service processes you must consistently:

1 Scope the customer service processes to be reviewed

- 1a. define the boundaries of a customer service process
- 1b. agree, with the appropriate people, the boundaries of the customer service process to be reviewed
- 1c. set parameters for the types of change that might be made during the re-engineering
- 1d. communicate with everybody involved regarding the aims of the review.

2 Analyse the customer service process and identify improvement opportunities

- 2a. identify all the key steps in the customer service process
- 2b. analyse each step in the customer service process in fine detail
- 2c. assess each step in the customer service process with reference to customer satisfaction, costs and compliance with relevant regulation
- 2d. raise questions about each step in the current process to establish where there is scope for development and improvement
- 2e. explore all the questions raised with those involved in the process and their managers
- 2f. identify options for re-engineering improvements that deserve further investigation.

3 Evaluate improvement options and re-engineer service processes

- 3a. evaluate each option for re-engineering improvements that deserve further investigation
- 3b. make and agree recommendations regarding each option that has been evaluated for re-engineering the customer service process
- 3c. plan the implementation of agreed recommendations for re-engineering the customer service process
- 3d. implement re-engineering of the customer service process
- 3e. monitor the results of implementing re-engineering of the customer service process.

Knowledge and understanding

To be competent at reviewing and re-engineering customer service processes you must know and understand:

- a. ways to establish boundaries around a customer service process to be re-engineered
- b. who needs to be involved in the re-engineering process to ensure that the recommendations can be seen through
- c. the importance of communicating with those involved in service delivery when re-engineering the process
- d. ways to analyse and assess the effectiveness of separate steps in the customer service process
- e. the importance of identifying the right questions to challenge existing customer service processes appropriately
- f. techniques for implementing changes in customer service processes
- g. the importance of monitoring the effects of customer service process changes.

Level: 7

Credit value: 7

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Customer service performance can be measured by a wide variety of metrics and ratings collected in different ways by different organisations. Those measurements are needed if you are to be able to manage performance systematically and take positive actions for improvement. Information on performance must be collected and interpreted in order to identify appropriate management actions to promote improvement. This may involve reference to standards, benchmarks, targets and tolerances and also the identification of trends and patterns in the evidence that is monitored. This unit is about those monitoring and management processes. This unit is for you if you have responsibility for the customer service performance of individuals or a team and you have the authority to see management actions through.

Outcomes of effective performance

When you manage customer service performance you must consistently:

1 Monitor performance in customer service operations

- 1a. collect regular statistics on customer service operations performance
- 1b. interpret broad patterns of customer service operations statistics
- 1c. investigate questions raised by interpretation and analysis of performance
- 1d. interpret statistics regarding customer service performance in specific product and service areas
- 1e. match customer service performance statistics to benchmarks, targets, standards or agreed tolerances
- 1f. use customer service performance statistics to identify trends
- 1g. compare customer service performance statistics with broader quality monitoring results
- 1h. review resource provision to identify any resource changes needed to improve customer service performance management.

2 Take management actions to improve performance in customer service operations

- 2a. identify management actions to maintain and improve on customer service performance
- 2b. summarise monitoring evidence to support the case for management actions to improve performance
- 2c. brief team members on changes they must make to improve customer service performance
- 2d. organise resource changes needed to improve customer service performance
- 2e. organise suitable coaching or training to improve customer service performance where development needs have been identified
- 2f. adjust customer service performance targets which have ceased to be both challenging and achievable.

Knowledge and understanding

To be competent at managing customer service performance you must know and understand:

- a. methods for collecting statistics on customer service operations performance
- b. techniques for interpreting customer service performance statistics
- c. the importance of setting targets that are SMART (Specific, Measurable, Achievable, Realistic, Time-bound)
- d. sources of benchmarks and standards for customer service performance
- e. techniques for identifying trends and patterns in customer service performance
- f. options for management actions that will improve customer service performance
- g. methods of coaching and training to improve customer service performance.

Appendix 1 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on www.cityandguilds.com.

Providing City & Guilds qualifications – a guide to centre and qualification approval

contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification. Specifically, the document includes sections on:

- The centre and qualification approval process and forms
- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions.

Ensuring quality contains updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document contains information on:

- Management systems
- Maintaining records
- Assessment
- Internal verification and quality assurance
- External verification.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- ***Walled Garden***
Find out how to register and certificate candidates on line
- ***Events***
Contains dates and information on the latest Centre events
- ***Online assessment***
Contains information on how to register for GOLA assessments.

City & Guilds
Skills for a brighter future



www.cityandguilds.com

Useful contacts

UK learners

General qualification information

E: learnersupport@cityandguilds.com

International learners

General qualification information

F: +44 (0)20 7294 2413

E: intcg@cityandguilds.com

Centres

Exam entries, Registrations/enrolment, Certificates, Invoices, Missing or late exam materials, Nominal roll reports, Results

F: +44 (0)20 7294 2413

E: centresupport@cityandguilds.com

Single subject qualifications

Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change

F: +44 (0)20 7294 2413

F: +44 (0)20 7294 2404 (BB forms)

E: singlesubjects@cityandguilds.com

International awards

Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports

F: +44 (0)20 7294 2413

E: intops@cityandguilds.com

Walled Garden

Re-issue of password or username, Technical problems, Entries, Results, GOLLA, Navigation, User/menu option, Problems

F: +44 (0)20 7294 2413

E: walledgarden@cityandguilds.com

Employer

Employer solutions, Mapping, Accreditation, Development Skills, Consultancy

T: +44 (0)121 503 8993

E: business_unit@cityandguilds.com

Publications

Logbooks, Centre documents, Forms, Free literature

F: +44 (0)20 7294 2413

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F +44 (0)20 7294 2413
www.cityandguilds.com**

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