Unit 401 Manage customer service operations

UAN:	**M/506/2898**
Level:	4
Credit value:	7
GLH:	23
Relationship to NOS:	Customers Service (2013) National Occupational Standards: • CFACSB13 Plan, organise and control customer service operations • CFACSD20 Manage customer service performance
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Skills CFA Assessment Strategy Competence units (S/NVQ)
Aim:	This unit aims to provide the knowledge and skills required to manage customer service operations. Upon completion of this unit. Learners will be able to both plan and manage customer service operations. Learners will also be able to prepare staff for the delivery of customer service and measure customer service performance.

Learning outcome
The learner will: 1. understand the management of customer service operations
Assessment criteria
The learner can: 1.1 explain the basis for allocating **resources** **1.2** assess the suitability of a range of **methods to monitor customer service operations** 1.3 explain the strategies needed to deliver seamless customer service 1.4 explain **techniques** used to develop solutions to problems 1.5 evaluate **sources of information** on customer performance data 1.6 analyse a **range of techniques to identify patterns and trends** in customer behaviour and customer service performance 1.7 analyse a range of possible improvements to customer service operations.

Assessment guidance

Resources:

- finance
- staff- rotas, schedules, workloads
- materials

Methods to monitor customer service operations:

Here the candidate will be required to assess the suitability of at least **three** methods.

Monitoring techniques:

- listening to calls
- reviewing written communication
- getting direct feedback from customers
- use of mystery shoppers
- direct observation of practice
- sales figures
- returns/complaints figures
- achievement of targets, KPIs etc
- staff absences

Sources of information:

Here the candidate will evaluate at least **two** sources of information:

- sales figures
- returns/complaints figures
- achievement of targets, KPIs etc

Range of techniques to identify patterns and trends eg social techniques

Evidence may be supplied by:

- questioning
- professional discussion
- reflective account
- organisational policies and procedures*
- legislative and regulatory requirements*
- organisational documentation*

Learning outcome
The learner will: 2. be able to plan customer service operations
Assessment criteria
The learner can: 2.1 define the **service offer** to meet identified customer expectations 2.2 develop plans that will enable sustainable and consistent customer service operations to agreed standards 2.3 develop contingencies that address identified risks 2.4 specify targets, objectives, key performance indicators (KPIs) and monitoring arrangements 2.5 communicate objectives, targets, standards and procedures to staff.

Assessment guidance
Service offer: A service offer defines the extent and limits of the customer service that an organisation is offering. (ICS glossary of terms). The service offer will detail what the organisation will do for the customer eg deliver in 24 hours, that complaints will be responded to within 48 hours, outlines the returns policy. **Evidence may be supplied by:** • witness testimony • observation • questioning • professional discussion • reflective account • customer feedback* • customer records* • report on managing customer service operations • organisational policies and procedures* • legislative and regulatory requirements • organisational documentation*

Learning outcome
The learner will: 3. be able to manage customer service operations
Assessment criteria
The learner can: 3.1 allocate **resources** according to agreed priorities 3.2 keep staff informed of developments in the **customer service offer** 3.3 keep staff informed of developments in best practice for the delivery of customer service 3.4 maintain positive working relationships amongst staff 3.5 carry out monitoring activities in accordance with plans 3.6 manage deviations from expected performance and service failures in accordance with contingency plans 3.7 use feedback from staff and customers to make improvements 3.8 take action within the limits of their responsibility to make improvements to customer service performance.

Assessment guidance
Resources: • finance • staff- rotas, schedules, workloads • materials **Customer service offer:** The customer service offer will detail what the organisation will do for the customer eg deliver in 24 hours, that complaints will be responded to within 48 hours, outlines the returns policy. **Evidence may be supplied by:** • witness testimony • observation • questioning • professional discussion • reflective account • customer feedback* • customer records* • report on managing customer service operations • organisational policies and procedures* • legislative and regulatory requirements* • organisational documentation*

Learning outcome
The learner will: 4. be able to prepare staff for the delivery of customer service
Assessment criteria
The learner can: 4.1 confirm that **staff understand** the vision, objectives, roles, plans, standards and procedures to deliver customer service 4.2 provide training and support that will enable staff to deliver customer service to the required standards 4.3 communicate to staff their roles, responsibilities and work plans in line with delivery plans.

Assessment guidance
The candidate must ensure they confirm that **staff understand** all of the following: • vision • objectives • roles • plans • standards • procedures **Evidence may be supplied by:** • witness testimony • observation • questioning • professional discussion • reflective account • customer feedback* • customer records* • report on managing customer service operations • organisational policies and procedures* • legislative and regulatory requirements* • organisational documentation*

Learning outcome
The learner will: 5. be able to measure customer service performance
Assessment criteria
The learner can: 5.1 take action to ensure that systems to collect agreed performance data are in place 5.2 identify trends of customer behaviour and customer service performance from performance data 5.3 benchmark performance against agreed measures 5.4 address identified anomalies and problems 5.5 identify areas for improvement within customer service.

Assessment guidance
Evidence may be supplied by: • witness testimony • observation • questioning • professional discussion • reflective account • customer feedback* • customer records* • report on managing customer service operations • organisational policies and procedures* • legislative and regulatory requirements* • organisational documentation* Note: Here the candidate may prefer to produce a report that outlines how they worked their way through the unit. This report will require to be backed by additional evidence that provides confirmation that they competently managed customer service operations. *Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.