

Customer Service

National Occupational Standards

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Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have 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.

Your attitude and the way you behave towards customers affects customer satisfaction. Simply following procedures may not be enough to provide good customer service. Customers like to deal with organisations whose staff show that they are willing and keen. Customers like to know that you and your colleagues want to help. You can show this by being friendly and positive and giving them your full personal attention.

CFACSA1

Maintain a positive and customer-friendly attitude

Performance criteria

Show the right attitude for customer service

You must be able to:

- P1 speak to customers clearly and put them at their ease
- P2 recognise how customers are feeling and establish a rapport with them
- P3 show customers that you are willing and enthusiastic at all times
- P4 recognise that each customer is different and treat them as individuals
- P5 show customers respect at all times and in all circumstances
- P6 show customers that you can be relied on
- P7 show colleagues respect at all times and in all circumstances
- P8 show colleagues that you can be relied on

Show appropriate and positive behaviours to customers

You must be able to:

- P9 recognise and respond when a customer wants or needs attention
- P10 greet customers politely and positively
- P11 focus on your customers and ignore distractions
- P12 react appropriately to situations that are important enough to interrupt your work with your customer
- P13 thank customers for the information they have given or for doing business with your organisation
- P14 help colleagues to provide good customer service

CFACSA1

Maintain a positive and customer-friendly attitude

Knowledge and understanding

You need to know and understand:

- K1 signs that a customer gives when seeking attention
- K2 what rapport is and what it looks, sounds and feels like
- K3 what is important enough to interrupt your work with a customer
- K4 positive and negative body language and facial expressions
- K5 that people are different and have different expectations for many reasons such as their age, culture and personality

CFACSA1

Maintain a positive and customer-friendly attitude

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Overview

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This Standard is all about the skills you need to deal with your customer in person and face to face. When you are working with a customer in this way, good feelings about the way you look and behave can improve how your customer feels about the transaction and give them greater satisfaction. Whilst verbal communication is important, your focus on your customer and the relationship that is formed also depends on the non-verbal communication that takes place between you. You have many opportunities to impress your customer and your behaviour in this situation can make all the difference to customer behaviour and the satisfaction that they feel.

CFACSA10

Deal with customers face to face

Performance criteria

Communicate effectively with your customer

You must be able to:

- P1 plan a conversation with your customer that has structure and clear direction
- P2 hold a conversation with your customer that establishes rapport
- P3 focus on your customer and listen carefully to ensure that you collect all possible information you need from the conversation
- P4 explain your services or products and your organisation's service offer to your customer clearly and concisely
- P5 adapt your communication to meet the individual needs of your customer
- P6 anticipate your customer's requests and needs for information
- P7 balance conflicting demands for your attention whilst maintaining rapport with your current customer
- P8 calm down the situation when one customer is adversely affecting the customer service enjoyed by other customers

Build rapport with your customer through body language

You must be able to:

- P9 present a professional and respectful image when dealing with your customer
- P10 show an awareness of your customer's needs for personal space
- P11 focus attention on your customer so that non-verbal signs do not indicate disinterest, boredom or irritation
- P12 ensure that your customer focus is not interrupted by colleagues
- P13 observe all customers and the total customer service situation whilst maintaining rapport with your customer
- P14 observe your customer to read non-verbal clues about their wishes and expectations

CFACSA10

Deal with customers face to face

Knowledge and understanding

You need to know and understand:

- K1 the importance of speaking clearly and slowly when dealing with a customer face to face
- K2 the importance of taking the time to listen carefully to what your customer is saying
- K3 your organisation's procedures that impact on the way you are able to deal with your customers face to face
- K4 the features and benefits of your organisation's services or products
- K5 your organisation's service offer and how it affects the way you deal with customers face to face
- K6 the principles of body language that enable you to interpret customer feelings without verbal communication
- K7 the differences between behaving assertively, aggressively and passively
- K8 why the expectations and behaviour of individual customers will demand different responses to create rapport and achieve customer satisfaction
- K9 the agreed and recognised signs in customer behaviour in your organisation that indicate that your customer expects a particular action by you.

CFACSA10

Deal with customers face to face

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Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have 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.

Many organisations deal with incoming telephone calls as a key part of their customer service. Customer expectations are high when calling organisations because they have had an opportunity to prepare for their call. In addition, many calls start with customers in a negative frame of mind because they see making a call as a way of dealing with a customer service problem. This Standard is about being prepared to deal effectively with calls and using effective communication to satisfy customers with the outcome of each incoming call.

CFACSA11

Deal with incoming telephone calls from customers

Performance criteria

Use telecommunications systems effectively

You must be able to:

- P1 operate telecommunications equipment efficiently and effectively
- P2 speak clearly and slowly and adapt your speech to meet the individual needs of your customer
- P3 listen carefully when collecting information from your customer
- P4 select the information you need to record and store following your organisation's guidelines
- P5 update customer records during or after the call to reflect the key points of the conversation

Establish rapport with customers who are calling

You must be able to:

- P6 greet your customer following your organisation's guidelines
- P7 listen closely to your customer to identify their precise reason for calling and what outcome they are seeking from the call
- P8 confirm the identity of your customer following organisational guidelines
- P9 use effective and assertive questions to clarify your customer's requests

Deal effectively with customer questions and requests

You must be able to:

- P10 identify the options you have for responding to your customer and weigh up the benefits and drawbacks of each
- P11 choose the option that is most likely to lead to customer satisfaction within the service offer
- P12 give clear and concise information to customers in response to questions or requests
- P13 use questions and answers to control the length of the conversation
- P14 keep your customer informed about your actions when accessing information to provide responses or if they are going to be on hold for a period of time
- P15 put your customer on hold and ensure you cannot be heard if you are discussing action with others or calling a colleague
- P16 summarise the outcome of the call and any actions that you or your customer will take as a result
- P17 check before the call is finished that your customer is content that all their questions or requests have been dealt with
- P18 complete any follow up actions agreed during the call
- P19 take a clear message for a colleague if you are unable to deal with some aspect of your customer's questions or requests
- P20 ensure that promises to call back are kept

CFACSA11

Deal with incoming telephone calls from customers

Knowledge and understanding

You need to know and understand:

- K1 your organisation's guidelines and procedures for the use of the telecommunications system
- K2 how to operate your organisation's telecommunications system
- K3 the importance of speaking clearly and slowly when dealing with customers by telephone
- K4 the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone
- K5 the importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand
- K6 what information it is important to note during or after telephone conversations with customers
- K7 your organisation's guidelines and procedures for what should be said during telephone conversations with customers
- K8 the importance of keeping your customer informed if they are on hold during a call
- K9 the importance of not talking across an open line
- K10 what details should be included if taking a message for a colleague
- K11 your organisation's guidelines and procedures for taking action to follow up calls made to customers
- K12 your organisation's guidelines for handling abusive calls

CFACSA11

Deal with incoming telephone calls from customers

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Suite	Customer Service (2013)
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Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have 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.

Many customer service jobs involve contacting customers by telephone. Making an effective telephone call involves very specific actions and should not be seen as a casual activity. By making a call to a customer you have the opportunity to prepare and you are therefore more likely to be able to lead the conversation in the direction you want it to go. This Standard is about planning and making calls to customers in a way that contributes positively to your organisation's customer service.

CFACSA12

Make telephone calls to customers

Performance criteria

Plan your calls effectively

You must be able to:

- P1 use appropriate customer information to plan your call
- P2 anticipate your customer's expectations and assemble all the information you might need before your conversation with your customer
- P3 identify the objective of your call and the way in which you want the call to end
- P4 plan the opening part of your conversation with your customer and anticipate their possible responses

Use telecommunications systems effectively

You must be able to:

- P5 operate telecommunication equipment efficiently and effectively
- P6 speak clearly and slowly and adapt your speech to meet the individual needs of your customer
- P7 listen carefully when collecting information from your customer
- P8 select the information you need to record and store following your organisation's guidelines
- P9 update customer records during or after the call to reflect the key points of the conversation

Make focussed calls to your customer

You must be able to:

- P10 open the conversation positively and establish a rapport with your customer
- P11 confirm the identity of your customer following organisational guidelines
- P12 ensure that your customer is aware of the purpose of your call as early as possible
- P13 respond positively to queries and objections from your customer
- P14 summarise the outcome of the call and any actions that you or your customer will take as a result
- P15 complete any follow up actions agreed during the call

CFACSA12

Make telephone calls to customers

Knowledge and understanding

You need to know and understand:

- K1 relevant parts of legislation, external regulations and your organisation's procedures relating to the use of customer information to plan calls
- K2 how to make use of information, including information through social media, about your customer when making a call
- K3 your organisation's guidelines and procedures for the use of the telecommunications system
- K4 how to operate your organisation's telecommunications system
- K5 the importance of speaking clearly and slowly when dealing with customers by telephone
- K6 the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone
- K7 the importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand
- K8 what information it is important to note during or after telephone conversations with customers
- K9 your organisation's guidelines and procedures for what should be said and not said during telephone conversations with customers
- K10 your organisation's guidelines and procedures for taking action to follow up calls made to customers

CFACSA12

Make telephone calls to customers

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Key words	customer service; communication; problem solving; behaviours; work with others; team working; outgoing telephone; outbound; conversation; planning; communication; focussing; summarise

CFACSA13

Deal with customers in writing or electronically



Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have 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.

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 Standard is all about how written or electronic communication can be made effective and can contribute to excellent customer service.

CFACSA13

Deal with customers in writing or electronically

Performance criteria

Use written or electronic communication effectively

You must be able to:

- P1 operate equipment used to communicate in writing or electronically efficiently and effectively
- P2 ensure that the period of time between exchanges in writing or electronically represents excellent customer service
- P3 use language that is clear and concise
- P4 adapt your use of language to meet the individual needs of your customer
- P5 ensure that the style and tone of your written or electronic communication follows your organisation's guidelines and matches the service offer
- P6 follow the conventions and accepted practices of the communication channel or electronic platform you are using

Plan and send an effective written or electronic communication

You must be able to:

- P7 anticipate your customer's expectations taking account of any previous exchanges you may have had
- P8 assemble all the information you need to construct the communication
- P9 plan the objective of your communication
- P10 format your communication following your organisation's guidelines
- P11 open the communication positively to establish a rapport with your customer
- P12 ensure that your customer is aware of the purpose of the communication as early as possible
- P13 summarise the key point of the communication and any actions that you or your customer will take as a result

Handle incoming written or electronic communications effectively

You must be able to:

- P14 read your customer's communication carefully to identify their precise reason for contacting you
- P15 identify what they are seeking as the outcome of the contact
- P16 identify all the options you have for responding to your customer and weigh up the benefits and drawbacks of each
- P17 choose the option that is most likely to lead to customer satisfaction within the service offer
- P18 summarise the outcome of the communication and any actions that you or your customer will take as a result

CFACSA13

Deal with customers in writing or electronically

Knowledge and understanding

You need to know and understand:

- K1 the importance of using clear and concise language
- K2 the additional significance and potential risks involved in committing a communication to a permanent record format
- K3 the effects of style and tone on the reader of a written or electronic communication
- K4 the importance of adapting your language to meet the needs of customers who may find the communication hard to understand
- K5 your organisation's guidelines and procedures relating to written and electronic communication
- K6 how to operate equipment used for producing and sending written or electronic communications
- K7 the importance of keeping your customer informed if there is likely to be any delay in responding to a communication
- K8 the risks associated with the confidentiality of written or electronic communications
- K9 the conventions and accepted practices of the channel of communication or electronic platform you are using

CFACSA13

Deal with customers in writing or electronically

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Suite	Customer Service (2013)
Key words	Writing; letters; emails; records; contact centres; customer service; communication; problem solving; behaviours; work with others; team working

Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have 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.

Customer service contributes to an organisation's competitive position. Customers of many organisations have choices 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 to which supplier the customer chooses. This Standard 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 or products. The Standard is not for you if your organisation does not compete actively with others.

CFACSA14

Use customer service as a competitive tool

Performance criteria

Organise customer service to gain a competitive advantage

You must be able to:

- P1 develop your own and colleagues' understanding of the services or products offered by your organisation
- P2 define your organisation's service offer and the ways in which it compares with those of your competitors
- P3 set an example for colleagues and present an image to your customers that reinforces your organisation's service offer
- P4 encourage customer service actions that create and develop customer loyalty

Deliver a competitive service

You must be able to:

- P5 take positive actions and encourage colleagues to take actions that provide individual customers with added value within your organisation's service offer
- P6 remind your customers about your service offer and the extra benefit it provides over those of your competitors
- P7 offer additional technical advice to customers within your organisation's service offer
- P8 show awareness of the financial implications of any added value actions that you or your colleagues might offer
- P9 meet customer service targets to ensure that your customers see the benefit of dealing with you rather than with a competitor
- P10 re-direct customers to other service providers without causing offence when their expectations cannot be met by your organisation's service offer
- P11 ensure that customers who have shown a previous interest in repeat and additional services are reminded of this
- P12 encourage colleagues to offer complementary services or products when customer satisfaction indicates that your customers would be interested in them

CFACSA14

Use customer service as a competitive tool

Knowledge and understanding

You need to know and understand:

- K1 the factors that lead to customers' belief that they are enjoying value for money
- K2 how to research and compare services or products, including using the internet and social media sources
- K3 the services or products offered by your organisation
- K4 the services or products offered by competitors
- K5 features and benefits of services or products that are seen by customers as added value
- K6 the purpose of adding non-chargeable items to the service offer in order to impress customers and develop customer loyalty
- K7 how to portray a positive image that reinforces your organisation's competitive position
- K8 your organisation's customer service targets and cost implications of added value actions to improve the organisation's competitive position
- K9 complementary services or products that may be of interest to your customers

CFACSA14

Use customer service as a competitive tool

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Key words	Competition; services; products; customer service; communication; problem solving; behaviours; work with others; team working

CFACSA15

Organise the promotion of additional services or products to customers



Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have 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.

This Standard is about expanding and extending the relationship with your customers by persuading them to make use of additional services or products that you can offer. Your services or products will remain viable only if they are used by customers. The Standard 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 in the future. You need to show that you are promoting the services or products by encouraging more people to use them.

CFACSA15

Organise the promotion of additional services or products to customers

Performance criteria

Offer additional services or products

You must be able to:

- P1 offer additional services or products to your customers
- P2 identify the benefits of offering additional services or products for your customers and the organisation
- P3 explain the features and benefits of additional services or products to your customers
- P4 identify ways of encouraging customers to ask about additional services or products

Organise support to promote use of additional services or products

You must be able to:

- P5 discuss with others ways of promoting additional services or products to your customers
- P6 implement procedures to ensure that customers interested in additional services or products are dealt with promptly
- P7 promote services or products which will suit your customers but which are supplied from outside your own area of the organisation
- P8 help customers to access services or products which are supplied outside of your own area of the organisation

Monitor the promotion of additional services or products

You must be able to:

- P9 devise methods to inform customers about additional services or products
- P10 use different methods to inform customers about additional services or products and record successes and failures against each method
- P11 use your record of successes and failures to identify the best approach for offering additional services or products
- P12 share information with others regarding the best approach to take when offering additional services or products to your customers

CFACSA15

Organise the promotion of additional services or products to customers

Knowledge and understanding

You need to know and understand:

- K1 your organisation's procedures and systems for encouraging the use of additional services or products
- K2 how the use of additional services or products will benefit your customers
- K3 the main factors that influence customers to use your services or products
- K4 how to introduce additional services or products to your customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products
- K5 how to give appropriate, balanced information to your customers about services or products
- K6 the importance of the influence of others when your customer is making decisions about additional services or products

CFACSA15

Organise the promotion of additional services or products to customers

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Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have 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.

Effective and improving customer service may make use of a customer service knowledge base. This knowledge base is built up continuously as the organisation learns from interaction with its customers. A knowledge base may contain a wide variety of information about customers and their transactions with the organisation. It may be drawn from a wide variety of sources. 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 Standard is all about actions you take to add to the knowledge base and how you use it to develop the way you deal with customer transactions. This Standard is for you only if your organisation has a systematic and technology supported approach to building a customer knowledge base.

CFACSA16

Build a customer service knowledge base

Performance criteria

Input details of customer queries and requests and develop responses

You must be able to:

- P1 identify through active listening customer queries and comments for inclusion in the knowledge base
- P2 classify information collected through customer contact for inclusion in the knowledge base
- P3 identify questions frequently asked by customers
- P4 identify the broad customer service messages of your organisation's answers to frequently asked questions
- P5 work with colleagues to develop responses to customer queries and requests
- P6 contribute ideas and responses to the customer knowledge base which build on key organisational customer service messages
- P7 check the effects of possible responses included in the knowledge base with customers during live customer service delivery or in trials
- P8 monitor the customer service knowledge base to identify trends and patterns

Use a customer service knowledge base

You must be able to:

- P9 access information from the customer service knowledge base using specific search criteria
- P10 browse the customer service knowledge base to research a topic of interest or project area
- P11 use the customer service knowledge base to inform the introduction of a new product or service variation
- P12 use the customer service knowledge base to respond to a specific customer request or query
- P13 assist a colleague to locate specific information in the customer service knowledge base
- P14 add to the customer service knowledge base as a result of dealing with a customer request or query

CFACSA16

Build a customer service knowledge base

Knowledge and understanding

You need to know and understand:

- K1 the structure and content of your organisation's customer service knowledge base
- K2 input and update routines for adding to the customer service knowledge base
- K3 ways in which information for a customer service knowledge base can be drawn from different sources, including social media platforms
- K4 ways that information in a customer service knowledge base can be classified
- K5 questions frequently asked by customers of your organisation
- K6 the importance of working with colleagues to develop responses to customer requests and queries
- K7 your organisation's key messages in relation to the services or products you are delivering
- K8 ways to interpret information in a customer service knowledge base
- K9 techniques for assisting a colleague to locate information in a customer service knowledge base

CFACSA16

Build a customer service knowledge base

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Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	improving customer service; knowledge; interaction; colleagues; customer transaction; customer service; communication; problem solving; behaviours; work with others; team working

Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have 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.

Staff with high levels of responsibility for customer service have an important role to play as champions of excellent service within their organisations. They should also promote customer service to service partners without whom their organisation cannot deliver reliable and excellent customer service. They need to have a great deal of knowledge and expertise from which others can benefit. This Standard is about acting as a champion – being constantly alert for issues that affect customer service, analysing these issues and their implications, challenging on behalf of the customer and passing on your knowledge and expertise to others.

CFACSA17

Champion customer service

Performance criteria

Promote the importance and benefits of customer service

You must be able to:

- P1 explain the role of customer service within your organisation's strategic and business plans
- P2 continuously monitor developments in your organisation in order to identify those important to customer service
- P3 analyse the implications of customer service developments in your organisation
- P4 question and challenge developments from the customer's standpoint
- P5 use your influence to ensure that developments improve customer service

Provide advice and information on customer service issues

You must be able to:

- P6 make it known that you can provide customer service advice and information
- P7 respond to requests for customer service advice and information
- P8 carry out any necessary research to enhance or verify the advice and information you are giving
- P9 communicate customer service advice and information effectively
- P10 help others to explore the implications of your advice and information for their own work and identify actions that the advice and information might prompt
- P11 monitor how effective your advice and information has been
- P12 review the way you collect information, formulate advice and communicate it to others

CFACSA17

Champion customer service

Knowledge and understanding

You need to know and understand:

- K1 the processes for decision making within your organisation and who is involved
- K2 how to monitor developments within your organisation
- K3 how to use your influence and authority to affect decision making
- K4 the types of developments that are likely to affect customer service and how to analyse the implications for customer service
- K5 the importance of empathising with customers and how to represent their viewpoint in a constructive way
- K6 how to identify when others need advice and information on customer service issues
- K7 how to use different types of research to support your advice and information on customer service
- K8 how to apply your advice and information in practice
- K9 how to monitor the effect of your advice and information

CFACSA17

Champion customer service

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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSA17
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Responsibility; excellent service; service partners; knowledge; champion; analyse; expertise; customer service; communication; problem solving; Behaviours; work with others; team working

CFACSA18

Make customer service environmentally friendly and sustainable



Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have 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.

Environmental awareness and positive action form an important aspect of strategy for many organisations. Customer service may impact on environmental performance by demanding additional resources. Environmental policies may impact on customer service by placing restrictions on how it can be delivered. Periodically, the link between customer service and environmentalism needs to be reviewed so that appropriate changes may be made. Environmental and sustainability awareness must be encouraged constantly so that staff, suppliers, customers and other stakeholders are reminded of their contributions and responsibilities. This Standard is appropriate for you if your job involves responsibility for customer service and sufficient authority to review and promote environmental matters in your organisation or in some part of it.

CFACSA18

Make customer service environmentally friendly and sustainable

Performance criteria

Review and monitor environmental and sustainability aspects of customer service

You must be able to:

- P1 identify your organisation's policies on customer service and on the environment and trace links between the two
- P2 identify your organisation's policy on energy management and carbon emissions and their key links with customer service systems
- P3 identify your organisation's policy on waste management and its key links with customer service systems
- P4 carry out a systematic review of your organisation's customer service systems to identify opportunities for environmental improvements
- P5 identify service partnerships that affect your organisation's environmental profile and what they might do to improve it
- P6 develop an action plan to promote environmental actions and improvements in your organisation's customer service delivery

Promote environmental and sustainable aspects of customer service in your organisation

You must be able to:

- P7 make links between your organisation's environmental policies and customer service delivery routines
- P8 encourage those involved in customer service delivery to promote an environmental approach by customers
- P9 identify and promote ways to minimise resource use in customer service delivery
- P10 communicate your organisation's environmental policies to service partners including suppliers and encourage their participation in environmental improvements
- P11 communicate your organisation's environmental policies to customers and encourage their participation in environmental improvements
- P12 develop staff awareness of environmental matters and ways they can contribute to environmentalism and sustainability
- P13 develop community stakeholder's awareness of your organisation's environmental policies and approaches

CFACSA18

Make customer service environmentally friendly and sustainable

Knowledge and understanding

You need to know and understand:

- K1 principles of environmentalism and sustainability that are relevant to customer service operations
- K2 ways to express environmental policies and link them with customer service
- K3 principles of energy management and reduction of carbon emissions
- K4 principles of waste management relevant to your organisation
- K5 techniques for reviewing environmental aspects of customer service systems
- K6 different actions that may be taken to improve environmental aspects of customer service delivery
- K7 ways to minimise resource use in customer service delivery
- K8 techniques for communicating and developing awareness of environmental matters among stakeholders
- K9 ways to encourage customers to act more environmentally friendly

CFACSA18

Make customer service environmentally friendly and sustainable

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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSA18
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Environmental; policies; sustainability; awareness; responsibilities; customer service; authority

Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have 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.

Many organisations interact with their customers through a variety of social media platforms. The evolution of Internet-based communication channels has led to customers choosing that medium for a wide range of communication with organisations providing services or products. Customers form expectations through the way the organisation presents itself in web-based communications and by the way it responds to customers and potential customers.

Expectations are also affected by the conventions and functions of a particular platform and by other customers and network contacts who act as influencers. The reputation of your organisation can be directly affected by social media interactions and in particular the way you deal with negative reactions and problems which find their way into a public arena. This Standard is about being prepared to deal effectively with customer contact through social media platforms and using social media to satisfy customers by meeting their expectations. Do not choose this Standard if your organisation does not expect you to make routine and regular use of social media for customer service.

CFACSA19

Deal with customers using a social media platform

Performance criteria

Use a social media platform effectively

You must be able to:

- P1 scan social media exchanges to identify relevant customer communications
- P2 respond to direct queries or requests through social media communications following organisational guidelines
- P3 explain your services or products and your organisation's service offer clearly and concisely to your customer
- P4 adapt your response using social media to your customer's precise needs
- P5 anticipate your customer's requests and needs for information
- P6 respond to social media communications and requests within organisational response time guidelines

Establish a rapport with customers using social media

You must be able to:

- P7 present a professional and respectful image when dealing with your customer
- P8 ensure that you interpret your customer's feelings from the tone and approach of their postings
- P9 respond to your customer in a way that shows you understand their feelings
- P10 follow the conventions of the chosen social media platform when responding to customers

Deal effectively with customer questions and requests

You must be able to:

- P11 search social media sources to identify customer questions and requests
- P12 use direct and effective questions to clarify your customer's requests
- P13 give clear and concise information in response to questions and requests
- P14 check the security settings of the social media platform if you make a private response to a customer
- P15 ensure that no further response is expected by your customer when dealing with a closing contact
- P16 take customer service opportunities to impress any other members of a social media community who see how you dealt with your customer

CFACSA19

Deal with customers using a social media platform

Knowledge and understanding

You need to know and understand:

- K1 your organisation's guidelines for dealing with customers through social media
- K2 ways to communicate customer service information to social media communities
- K3 how to search social media sources for postings by customers
- K4 how to anticipate your customer's requests and needs
- K5 the importance of interpreting your customer's feelings and perceptions from postings on social media networks
- K6 the conventions of social media platforms your customers choose to use
- K7 the importance of sending clear and concise messages when using social media platforms
- K8 how to control access to exchanges with customers using social media security settings
- K9 what details to share with a colleague if more than one of you become involved in exchanges with a customer using social media
- K10 how to recognise what should be the closing step in a series of social media exchanges with a customer

CFACSA19

Deal with customers using a social media platform

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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSA19
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Social media; customer service; communications; searches; social media platforms; information; customer questions; customer service information

CFACSA2

Behave in a way that gives a good customer service impression



Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have 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.

This Standard is all about how your behaviour affects the way your customers see you. Some of your customers expect different things from the service you offer but there are basic acceptable standards of behaviour and attitudes that you need to achieve. Your managers and supervisors also expect you to meet those standards. When you create the right impression and show a positive attitude you reduce the risk of somebody being upset or dissatisfied with the way you deal with them. This Standard is appropriate for you if you have done jobs where you had limited contact with customers, you are experiencing customer service work for the first time or you are just starting your first job. If you have already successfully done full or part-time work dealing directly with customers, this may not be the right Standard for you and you should consider the Standard - "Maintain a positive and customer-friendly attitude".

CFACSA2

Behave in a way that gives a good customer service impression

Performance criteria

Look and act the part

You must be able to:

- P1 dress for customer service work in the way your organisation expects
- P2 show you are working hard and making efforts to impress customers
- P3 be in the right place at the right time to give a good impression and deliver good customer service
- P4 show good manners when dealing with your customers

Relate to your customers and colleagues effectively

You must be able to:

- P5 talk clearly to customers using words that they can understand
- P6 talk to customers without using language that they would consider to be unsuitable
- P7 show a willing and friendly attitude when dealing with your customers without being over-familiar.
- P8 help and support colleagues to give good service to customers

CFACSA2

Behave in a way that gives a good customer service impression

Knowledge and understanding

You need to know and understand:

- K1 how the way you dress affects the way that your customers react to the service you provide
- K2 why your customers may see particular types of dress as inappropriate and how your organisation expects you to dress
- K3 why it is important for customers to feel that you are working hard to give them an excellent service
- K4 why good timekeeping and making sure you are where you are expected to be is important to giving excellent customer service
- K5 what behaviour is considered by most customers to be “good manners” and what is considered to be “bad manners” or rudeness
- K6 what the most appropriate ways of communicating with your customers are e.g. face to face, by telephone, text, e-mail, in writing or other social media
- K7 what the benefits are of using your chosen communication methods
- K8 what customers and colleagues might consider to be unsuitable language and why it may offend people
- K9 why customers feel better about the service they receive if you show a willing and friendly attitude
- K10 how to behave so that you appear to be willing and friendly with customers without being over-familiar
- K11 what you can do to cooperate with colleagues in giving customer service and why that might be helpful

CFACSA2

Behave in a way that gives a good customer service impression

Developed by	Skills CFA
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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSA2
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Behaviour; impression formation; good customer service; problem solving; behaviours; customer service principles; customer service professional; work with others; customer service language; knowledge; understanding

CFACSA20

Champion the use of social media to build customer trust and enhance brand value



Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have 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.

People with high levels of responsibility for customer service have an important role to play as champions of excellent service. They should also promote customer service to service partners without whom their own organisations cannot deliver reliable and excellent customer service. When an organisation uses social media platforms as a key part of its customer service strategy, one or more people may have special responsibility for encouraging the use of these communication channels with customers. This involves having a great deal of knowledge and expertise both about customer service and about the potential and use of social media. This Standard is about acting as a champion – being constantly alert for issues and opportunities that affect customer service through social media. A champion must also analyse issues and changes, challenging on behalf of customers and passing on knowledge and expertise to others.

CFACSA20

Champion the use of social media to build customer trust and enhance brand value

Performance criteria

Promote the importance and benefits of social media use in customer service

You must be able to:

- P1 explain the role of social media within your organisation's customer service strategy and business plans
- P2 continuously monitor developments in your organisation in order to identify those important to social media use in customer service
- P3 continuously monitor developments in social media in order to identify those important to customer service in your organisation
- P4 analyse the implications of customer service developments in social media for the organisation
- P5 question and challenge social media use from the customer's standpoint
- P6 use your influence to ensure that developments in use of social media improve customer service

Provide advice and information about social media use in customer service

You must be able to:

- P7 make it known that you can provide advice and information on the use of social media in customer service
- P8 respond to requests for advice and information on the use of social media in customer service
- P9 carry out any necessary research to enhance or verify the advice and information you are giving
- P10 communicate advice and information on the use of social media in customer service effectively
- P11 help others to explore the implications of your advice and information for their own work and identify actions that this might prompt
- P12 monitor how effective your advice and information has been
- P13 review the way you collect information about social media use, formulate advice and communicate it to others

CFACSA20

Champion the use of social media to build customer trust and enhance brand value

Knowledge and understanding

You need to know and understand:

- K1 the processes for decision making in your organisation and who is involved
- K2 how to monitor customer service within your organisation
- K3 how to monitor social media developments relevant to customer service
- K4 how to use your influence and authority to affect decision making
- K5 the types of developments in social media that may affect customer service and how to analyse the implications
- K6 the importance of empathising with customers and how to represent their viewpoint in a constructive way
- K7 how to identify when others need advice and information on the use of social media in customer service
- K8 how to use research to support your advice and information on the use of social media in customer service
- K9 how to apply your advice and information on the use of social media in customer service
- K10 how to monitor the effect of your advice and information on the use of social media in customer service

CFACSA20

Champion the use of social media to build customer trust and enhance brand value

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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSA20
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Social media; customer trust; champion; social media developments; research; customer service; decision making

Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have 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.

To provide good customer service you need to understand what your customers want and how they feel. This means that you need to share information with them and listen carefully to them. Your customers need to understand what you are telling them and what you must be able to do for them. Communication is an essential skill for delivering good customer service.

CFACSA3

Communicate effectively with customers

Performance criteria

You must be able to:

- P1 listen actively to what customers are saying
- P2 identify the most important things that customers are telling you
- P3 respond appropriately to what customers are telling you
- P4 check that you understand what customers are telling you and make sure it is really what they mean
- P5 summarise information for customers
- P6 explain in a way that is clear and does not cause offence when you cannot help a customer
- P7 use an appropriate tone when communicating with your customers
- P8 use appropriate body language when communicating with customers
- P9 read your customers' body language to help you understand their feelings and wishes
- P10 deal with customers in a respectful, helpful and professional way at all times
- P11 help to give good customer service by passing messages to colleagues
- P12 use appropriate styles when dealing with customers through different media

CFACSA3

Communicate effectively with customers

Knowledge and understanding

You need to know and understand:

- K1 the difference between hearing and listening
- K2 how to listen actively
- K3 how to read both positive and negative body language
- K4 how to use body language effectively
- K5 how to use questions to check that you understand what customers are telling you
- K6 the difference between negative and positive language
- K7 how to summarise information
- K8 why it is important to speak clearly
- K9 why it is important to use words your customer will understand
- K10 how to communicate with customers who have language, dialect or accents that are different from yours
- K11 why the way you say things and your tone of voice affect the way your customer experiences your customer service
- K12 what information is helpful to pass on in messages to colleagues so that customers receive good service
- K13 the styles that are appropriate for communicating in the social media you are using and the customers you are dealing with

CFACSA3

Communicate effectively with customers

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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSA3
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Communication; problem solving; behaviours; customer service principles; customer service professional; work with others; customer service language; service offer; knowledge; understanding problem solving; behaviours; customer service principles; customer

CFACSA4

Give customers a positive impression of yourself and your organisation



Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have 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.

Excellent customer service is provided by people who are good with people. Your behaviour affects the impression that customers have of the service they are receiving. This Standard is about communicating with your customers and giving a positive impression whenever you deal with a customer. By doing this you create a positive impression of your organisation and the customer service it provides. All of us enjoy the experience of good customer service if we feel that the person serving us really wants to create the right impression, responds to us, and gives us good information. Every detail of your behaviour counts when dealing with a customer.

CFACSA4

Give customers a positive impression of yourself and your organisation

Performance criteria

Meet your organisation's standards of appearance and behaviour

You must be able to:

- P1 greet your customer respectfully and in a friendly manner
- P2 communicate with your customer in a way that makes them feel valued and respected
- P3 identify and confirm your customer's expectations
- P4 treat your customer courteously and helpfully
- P5 keep your customer informed and reassured
- P6 adapt your behaviour to respond to different customer behaviour

Respond appropriately to customers

You must be able to:

- P7 respond promptly to a customer seeking help
- P8 choose the most appropriate way to communicate with your customer
- P9 check with your customer that you have fully understood their expectations
- P10 respond promptly and positively to your customer's questions and comments
- P11 allow your customer time to consider your response and give further explanation when appropriate

Communicate information to customers

You must be able to:

- P12 quickly find information that will help your customer
- P13 give your customer information they need about the services or products offered by your organisation
- P14 recognise information that your customer might find complicated and check whether they fully understand
- P15 explain clearly to your customers any reasons why their expectations cannot be met

CFACSA4

Give customers a positive impression of yourself and your organisation

Knowledge and understanding

You need to know and understand:

- K1 your organisation's standards for appearance and behaviour
- K2 your organisation's guidelines for how to recognise what your customer wants and respond appropriately
- K3 your organisation's rules and procedures regarding the methods of communication you use when dealing with customers
- K4 how to recognise when a customer is angry or confused
- K5 your organisation's standards for timeliness in responding to customer questions and requests for information

CFACSA4

Give customers a positive impression of yourself and your organisation

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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSA4
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	listening, hearing; speaking; communicate; positive impression; behaviour; problem solving; behaviours; customer service principles; customer service professional; work with others; customer service language; knowledge; understanding

CFACSA5

Promote additional services or products to customers



Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have 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 customer

Services or products are continually changing in organisations to keep up with customers' expectations. By offering new or improved services or products your organisation can increase customer satisfaction. Many organisations must promote these to be able to survive in a competitive world. However, it is equally important for organisations that are not in competition with others to encourage their customers to try new services or products. This Standard is about your need to keep pace with new developments and to encourage your customers to take an interest in them. Customers expect more and more services or products to be offered to meet their own growing expectations. They need to be made aware of what is available from your organisation. Because of this everybody offering services or products needs to play a part in making customers aware of what is available. You should not choose this Standard if your role does not encourage you to suggest additional services or products to customers.

CFACSA5

Promote additional services or products to customers

Performance criteria

Identify additional services or products that are available

You must be able to:

- P1 update and develop your knowledge of your organisation's services or products
- P2 check with others when you are unsure about new service or product details
- P3 identify appropriate services or products that may interest your customer
- P4 spot opportunities for offering your customer additional services or products that will improve their customer experience

Inform customers about additional services or products

You must be able to:

- P5 choose the best time to inform your customer about additional services or products
- P6 choose the best method of communication to introduce your customer to additional services or products
- P7 give your customer accurate and sufficient information to enable them to make a decision about the additional services or products
- P8 give your customer time to ask questions about the additional services or products

Gain customer commitment to using additional services or products

You must be able to:

- P9 close the conversation if your customer shows no interest in additional services or products
- P10 give information to move the situation forward when your customer shows interest in additional services or products
- P11 secure customer agreement and check customer understanding of the delivery of additional services or products
- P12 take action to ensure prompt delivery of the additional services or products to your customer
- P13 refer your customer to others or to alternative sources of information if the additional services or products are not your responsibility

CFACSA5

Promote additional services or products to customers

Knowledge and understanding

You need to know and understand:

- K1 your organisation's procedures and systems for encouraging the use of additional services or products
- K2 how additional services or products will benefit your customers
- K3 how your customer's use of additional services or products will benefit your organisation
- K4 the main factors that influence customers to use your services or products
- K5 how to introduce additional services or products to customers by outlining their benefits and overcoming reservations
- K6 how to give appropriate, balanced information to customers about services or products
- K7 the importance of the influence of others when you are promoting additional services or products to customers

CFACSA5

Promote additional services or products to customers

Developed by	Skills CFA
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Version number	2
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Date approved	January 2013
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Indicative review date	January 2016
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Validity	Current
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Status	Original
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Originating organisation	Skills CFA
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Original URN	CFACSA5
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Relevant occupations	Customer Service Occupations
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Suite	Customer Service (2013)
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Key words	customer service; services; products; communication; expectations; additional service; understanding; competition; customer satisfaction
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Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have 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.

You and your organisation need information about your customers and their behaviour to answer customer questions and to respond to customer requests. Information about customers is also used by your organisation to develop its customer service. Some customer information is collected from your customers. Other customer information is collected through information systems and equipment that make records of service delivery. In either case you must collect information, retrieve it and supply it when needed. Good customer information provides a sound basis for all customer service transactions. The quality of the customer information depends heavily on the skills and attention to detail of the person dealing with the information.

CFACSA6

Process information about customers

Performance criteria

Collect information about customers

You must be able to:

- P1 collect and record new information about customers following your organisation's guidelines
- P2 update existing information about customers
- P3 record and store information about customers that is accurate, sufficient and relevant following organisational guidelines

Select and retrieve information about customers

You must be able to:

- P4 respond promptly to authorised requests for information about customers
- P5 select and retrieve relevant information for customers or colleagues following your organisation's guidelines

Supply information about customers

You must be able to:

- P6 supply accurate and sufficient information about customers to meet your customers or colleagues' expectations
- P7 choose the most appropriate way to supply information to your customers or colleagues
- P8 confirm that your customers or colleagues have received and understood the customer information

CFACSA6

Process information about customers

Knowledge and understanding

You need to know and understand:

- K1 your organisation's procedures and guidelines for collecting, retrieving and supplying information about customers
- K2 types of personal information about customers that should and should not be kept on record
- K3 how to collect and validate information about customers efficiently and effectively
- K4 how to operate the customer information storage system
- K5 why processing information about customers correctly makes an important contribution to effective customer service
- K6 the importance of attention to detail when processing information about customers
- K7 legal and regulatory restrictions on the storage and use of customer data

CFACSA6

Process information about customers

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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSA6
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	customer service; communication; problem solving; behaviours; work with others; team working; gather information; answer questions; respond to requests; collect information; retrieve information; supply information

CFACSA7

Live up to the brand promise when delivering customer service



Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have most impact on the way your customer sees you and the services or products of 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.

You may work in an organisation that has a carefully defined brand and vision which includes a specific service offer and promise to your customers. Often, much work has taken place to develop these, and they influence what your customer expects. That service offer and promise are all part of a brand. By promoting the brand, the organisation is making a promise to your customers about what they can expect. Customer satisfaction is unlikely to be achieved if your customer's experience does not match their expectations of that promise. Even in organisations without a strong brand image, customers often have defined expectations. This Standard is about the way your work supports the branding of your services or products. It covers what you must do to make sure that you deliver the promise that your customer has come to expect. It also covers how you can avoid giving your customer an experience that is significantly different from the one offered in the promise.

CFACSA7

Live up to the brand promise when delivering customer service

Performance criteria

Understand and explain the customer service promise

You must be able to:

- P1 explain the key features of the service offer, vision and promise your organisation has made and which represent its brand
- P2 identify the role you can play to ensure that your customer believes that the brand promise is being delivered
- P3 explain the procedures and regulations your organisation follows to support the brand
- P4 devise and use phrases that reinforce the brand
- P5 identify and avoid phrases that might be used, but would not fit with the brand
- P6 identify moments and actions within the delivery of customer service that are particularly relevant to your customer's experience of the promise being delivered
- P7 share ideas with colleagues about how particular words and approaches help to support the brand promise

Produce customer satisfaction by delivering the customer service promise

You must be able to:

- P8 ensure that your appearance and behaviour supports the organisation's brand
- P9 observe or listen to your customer closely to identify opportunities to reinforce their understanding of the brand promise
- P10 take actions to deliver customer service in a way that meets your customer's expectations and understanding of the brand promise
- P11 ensure that what you decide to do is realistic and in line with the brand promise and customer expectations
- P12 be positive and supportive about the brand promise

CFACSA7

Live up to the brand promise when delivering customer service

Knowledge and understanding

You need to know and understand:

- K1 the brand promise made by your organisation's promotional materials
- K2 the key features, moments of truth (those points in the customer service process that have the most impact on the customer experience) and customer experiences that define the organisation's brand
- K3 ways in which staff can contribute to communicating the brand promise to customers
- K4 sales, marketing and/or public relations reasons for defining a brand
- K5 how words can be used and adapted to reflect a brand promise
- K6 the importance of using words and phrases that reinforce the brand
- K7 how a brand promise is affected by social media exchanges
- K8 how actions can be used and adapted to reflect a brand promise

CFACSA7

Live up to the brand promise when delivering customer service

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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSA7
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Branding; services; products; customer service; communication; problem solving; behaviours; work with others; team working; promises

Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have 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.

Research has shown that customer satisfaction increases if your customer feels that they have been treated in a way that recognises their own personal needs. When you are delivering customer service you often deal with a large number of customers who seem to be the same, but it is important to remember that each customer is an individual. Anything you can do to make each customer feel that they have had your complete attention and have been dealt with personally increases their sense of satisfaction. This Standard is about how you can help your customers feel that they have experienced a service that focuses on them as an individual. When you work with a customer you need to make them feel that it is on a 'one to one' basis, that you care what happens to them and that you respect them as an individual.

CFACSA8

Make customer service personal

Performance

criteria

You must be able to:

Identify opportunities for making customer service personal

- P1 identify which of your organisation's systems or procedures allows you to add a personal touch to your service
- P2 observe and listen to your customer carefully for signs that will guide how you personalise the service
- P3 let your customer know that you understand and that you are there to help
- P4 identify opportunities to help or direct your customer outside of normal routines and procedures
- P5 identify customers with particular needs who would especially appreciate personal service
- P6 balance the time you take when giving individual attention to one customer with the needs and expectations of other customers
- P7 make extra efforts to show how willing and able you are to give a more personal service

Treat your customer as an individual

You must be able to:

- P8 greet and deal with your customer in a way that respects them as an individual
- P9 focus your attention on the customer you are dealing with
- P10 always communicate with your customer in a friendly and open way
- P11 use your customer's name when it is known and appropriate
- P12 follow your organisation's guidelines about giving your customer your own name and contact details
- P13 concentrate on building a 'one to one' relationship with your customer by making them feel valued and respected

CFACSA8

Make customer service personal

Knowledge and understanding

You need to know and understand:

- K1 how use of your customer's name makes service more personal
- K2 personality types and their receptiveness to personalised services
- K3 types of personal information about customers that should and should not be kept on record
- K4 features of personal service that are most appreciated by customers with individual needs
- K5 body language and approaches to communication that are generally interpreted as open
- K6 your organisation's guidelines on actions that are permissible outside of the normal routines and procedures
- K7 your own preferences and comfort levels relating to how you are willing and able to personalise service
- K8 the boundaries beyond which personal customer service may be seen as inappropriate
- K9 how to assess your customer's reaction to personalised customer service
- K10 how to gain information about a customer's preferences, including through social media

CFACSA8

Make customer service personal

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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSA8
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Communicating; giving respect; personal touch; customer service; communication; problem solving; behaviours; work with others; team working; balancing time; relationship building

Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have 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.

When your customer feels that you have taken special care to give them good service and have done something more than they expect, they are likely to enjoy a better customer service experience. Opportunities to add this extra value to your customer's experience depend on you spotting what they will particularly appreciate. Often you can offer this little extra when sorting out a difficulty or problem. Whatever special service you give when you "go the extra mile" must be within your own authority or with the authority of an appropriate colleague. It must also take account of the organisation's service offer and all the relevant procedures and regulations. As customers, we all enjoy and remember it when somebody has "gone the extra mile" to deliver special customer service.

CFACSA9

Go the extra mile in customer service

Performance criteria

Distinguish between routine service and going the extra mile

You must be able to:

- P1 explain the service offer clearly and concisely
- P2 identify your customer's expectations and needs
- P3 match the service offer with your customer's expectations and needs and identify the key differences
- P4 identify options for other actions that will give added value to your customer service and impress your customer
- P5 choose actions that are most appropriate to impress your customer

Check that your extra mile ideas are feasible

You must be able to:

- P6 match your ideas for added value customer service against your authority to see them through
- P7 check that your ideas for added value customer service are allowed within your organisation's guidelines and by external regulations
- P8 check that your ideas for added value customer service will not affect the service to your other customers
- P9 explain your ideas for added value service to a senior colleague or other appropriate authority

Go the extra mile in customer service

You must be able to:

- P10 take action to go the extra mile in customer service
- P11 ensure that your customer is aware of the added value of your actions
- P12 monitor the effects of your added value actions to ensure that the service given to your other customers are unaffected
- P13 note and pass on positive feedback from your customer about your actions
- P14 monitor feedback about customer reactions to actions taken to go the extra mile

CFACSA9

Go the extra mile in customer service

Knowledge and understanding

You need to know and understand:

- K1 your organisation's service offer
- K2 how customers form expectations of the service they will receive
- K3 what types of service action most customers will see as adding value to customer service
- K4 your organisation's rules and procedures that determine your authority to go the extra mile
- K5 relevant legislation and regulation that impact on your freedom to go the extra mile
- K6 how your organisation receives customer service feedback on the types of customer experience that has impressed them
- K7 your organisation's procedures for making changes in its service offer
- K8 how to monitor feedback from customers and colleagues about actions taken to go the extra mile
- K9 how to recognise when particular extra mile actions become routine and might be suitably accommodated within the service offer

CFACSA9

Go the extra mile in customer service

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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSA9
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	customer service; communication; problem solving; behaviours; work with others; team working; feelings; adding value; appreciation; service offer

Overview

This Standard 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.

The customer service your organisation gives is affected by the way you do your job. Whatever job you are doing, customers expect you to do it properly. They also expect you to consider their wishes and feelings while you are doing it. Doing your job properly involves following procedures and doing the tasks in your job correctly as well as having the appropriate relationship with customers. This Standard covers how you do your job with your customer in mind in a way that your organisation and supervisors find acceptable. It will help you to understand the parts of your job that are most important to good customer service.

CFACSB1

Do your job in a customer friendly way

Performance criteria

Do your job in a customer-friendly way

You must be able to:

- P1 make a good first impression
- P2 follow the dress code of your organisation and present the right personal image to your customers
- P3 do the tasks that make up your job correctly and in a way that shows you know what your customers expect and what your organisation offers
- P4 show consideration to customers when carrying out the tasks required in your job
- P5 respond willingly to routine requests and questions from customers and recognise when to pass a request on to an appropriate colleague
- P6 share information with customers about how delivery of the service or product is going
- P7 work flexibly to help individual customers without reducing the level of service you give to others
- P8 share information with colleagues when they need it to provide good customer service

CFACSB1

Do your job in a customer friendly way

Knowledge and understanding

You need to know and understand:

- K1 your organisation's dress code
- K2 how to do the tasks that make up your job
- K3 how long parts of the job take to do and how this may affect your customers
- K4 how to do your own work in an organised way
- K5 what your customers expect of you and your work
- K6 the service offer that your organisation makes in your area of work and how that affects the way you do things
- K7 what you are allowed to do and not allowed to do for customers
- K8 how to do your job in a way that is healthy and safe for you, your customers and your colleagues

CFACSB1

Do your job in a customer friendly way

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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSB1
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	follow procedures; relationships; friendly; delivery; impression; dress code; customer expectations; share information; service offer; customer service; communication; problem solving; behaviours; work with others; team working

Overview

This Standard 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.

This Standard is about how you organise the delivery and maintenance of 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.

CFACSB10

Organise the delivery of reliable customer service

Performance criteria

Plan and organise the delivery of reliable customer service

You must be able to:

- P1 plan, prepare and organise everything you need to deliver services or products to different types of customers
- P2 organise what you do to ensure that you are consistently able to give prompt attention to your customers
- P3 reorganise your work to respond to unexpected additional workloads

Review and maintain customer service delivery

You must be able to:

- P4 maintain service delivery during very busy periods and unusually quiet periods
- P5 maintain service delivery when systems, people or resources have let you down
- P6 consistently meet your customers' expectations
- P7 balance the time you take with your customers with the demands of other customers seeking your attention
- P8 respond appropriately to your customers when they make comments about the services or products you are offering
- P9 alert others to repeated comments made by your customers
- P10 take action to improve the reliability of your service based on customer comments
- P11 monitor the action you have taken to identify improvements in the service you give to your customers

Use recording systems to maintain reliable customer service

You must be able to:

- P12 record and store customer service information accurately following organisational guidelines
- P13 select and retrieve customer service information that is relevant, sufficient and in an appropriate format
- P14 quickly locate information that will help solve a customer's query
- P15 supply accurate customer service information to others using the most appropriate method of communication

CFACSB10

Organise the delivery of reliable customer service

Knowledge and understanding

You need to know and understand:

- K1 organisational procedures for unexpected situations and your role within them
- K2 resource implications in times of staff sickness and holiday periods and your responsibility at these times
- K3 the importance of having reliable and fast information for your customers and your organisation
- K4 organisational procedures and systems for delivering customer service
- K5 how to identify useful customer feedback and how to decide which feedback should be acted on
- K6 how to communicate feedback from customers to others
- K7 organisational procedures and systems for recording, storing, retrieving and supplying customer service information.
- K8 legal and regulatory requirements regarding the storage of data

CFACSB10

Organise the delivery of reliable customer service

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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSB10
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Organising; delivery; reliable; resources; systems; support service; customer service; communication; problem solving; behaviours; work with others; team working; giving information; receiving information services; products

Overview

This Standard 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.

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.

CFACSB11

Improve the customer relationship

Performance criteria

Improve communication with your customers

You must be able to:

- P1 select and use the best method of communication to meet your customers' expectations
- P2 take the initiative to contact your customers to update them when things are not going to plan or when you require further information
- P3 adapt your communication to respond to individual customers' feelings
- P4 monitor information about your interaction with customers using all available information channels

Balance the needs of your customer and your organisation

You must be able to:

- P5 meet your customers' expectations within your organisation's service offer
- P6 explain the reasons to your customers sensitively and positively when their expectations cannot be met
- P7 identify alternative solutions for your customers either within or outside the organisation
- P8 identify the costs and benefits of these solutions to your organisation and to your customers
- P9 negotiate and agree solutions with your customers which satisfy them and are acceptable to your organisation
- P10 take action to satisfy your customers with the agreed solution when balancing their needs with those of your organisation

Exceed customer expectations to develop the relationship

You must be able to:

- P11 make extra efforts to improve your relationship with your customers
- P12 recognise opportunities to exceed your customers' expectations
- P13 take action to exceed your customers' expectations within the limits of your own authority
- P14 gain the help and support of others to exceed your customers' expectations

CFACSB11

Improve the customer relationship

Knowledge and understanding

You need to know and understand:

- K1 how to make best use of the method of communication chosen for dealing with your customers
- K2 how to negotiate effectively with your customers
- K3 how to assess the costs and benefits to your customer and your organisation of any unusual agreement you make
- K4 the importance of customer loyalty and/or improved internal customer relationships to your organisation
- K5 how to monitor information about your interaction with customers from every available source including internet communication channels and social media platforms

CFACSB11

Improve the customer relationship

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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSB11
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Relationships; customer service; reliable; exceed expectations; external customer; internal customer; loyalty; service partnerships; customer service; communication; problem solving; behaviours; work with others; giving Information; teamwork

CFACSB12

Maintain and develop a healthy and safe customer service environment



Overview

This Standard 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.

Health and safety is important in all areas of work, and customer service is no exception. To provide high levels of customer service it is also important to provide an environment that enables and encourages staff to work effectively but safely for themselves and for customers. This Standard is about managing the delivery of services or products in a way that is safe for customers and colleagues.

CFACSB12

Maintain and develop a healthy and safe customer service environment

Performance criteria

Assess the customer service environment for factors that affect health and safety

You must be able to:

- P1 identify health and safety hazards in your customer service environment
- P2 assess the risks associated with these hazards
- P3 identify health and safety factors that may reduce the effectiveness of customer service staff or may cause concern to customers
- P4 evaluate health and safety factors that may reduce the effectiveness of customer service staff or may cause concern to customers against your organisation's policies and procedures and customer expectations
- P5 provide information about risks and hazards to those responsible for health and safety

Minimise risks to health and safety in the customer service environment

You must be able to:

- P6 ensure that staff have access to information on health and safety in the workplace and their responsibilities for health and safety
- P7 ensure that measures are in place to control risks to health and safety and are consistent with organisational policies and procedures
- P8 ensure that customers and staff are briefed on measures to control risks to health and safety and that they follow them
- P9 enable staff to identify and report health and safety hazards
- P10 use agreed organisational procedures to deal with hazards when they occur
- P11 review the health and safety aspects of the customer service environment as required by law and your organisation
- P12 carry out emergency drills within your area of responsibility
- P13 follow organisational procedures for keeping health and safety records up-to-date and for reporting health and safety incidents

CFACSB12

Maintain and develop a healthy and safe customer service environment

Knowledge and understanding

You need to know and understand:

- K1 the importance of maintaining a healthy, safe and effective working environment for customers and staff
- K2 your responsibilities for health and safety in the workplace
- K3 your responsibilities for maintaining an effective working environment
- K4 how to access information on legal and regulatory requirements for health and safety and relevant codes of practice
- K5 the types of health and safety hazards that are likely to occur in your area of responsibility
- K6 how to assess the risks associated with these health and safety hazards
- K7 how to control these risks in a way that is consistent with legal and regulatory requirements and codes of practice
- K8 your organisation's policies and procedures for health and safety
- K9 the recording and reporting procedures within your organisation that are relevant to maintaining a healthy and safe environment

CFACSB12

Maintain and develop a healthy and safe customer service environment

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Validity	Current
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Originating organisation	Skills CFA
Original URN	CFACSB12
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Health; safety; environment; delivery; customer service; risks; hazards; emergency; drills; codes of practice; customer service; communication; problem solving; behaviours; work with others; team work; giving information; receiving information

CFACSB13

Plan, organise and control customer service operations



Overview

This Standard 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.

Delivering effective customer service is key to winning and maintaining customer loyalty. This requires careful planning and organisation, followed by close monitoring and control of customer service operations. When problems occur, you must be able to deal with these problems in a way that leaves your customer with a positive impression of your organisation. This Standard is about managing the delivery of services to the customer.

CFACSB13

Plan, organise and control customer service operations

Performance criteria

You must be able to:

Plan customer service operations

- P1 analyse customer expectations and define the service offer designed to meet those expectations
- P2 develop specific plans that will ensure sustainable and consistent delivery of customer service
- P3 identify any contingencies that may occur, assess their risks and develop effective plans to deal with them
- P4 plan how you will monitor and evaluate customer service operations

Supervise customer service operations

You must be able to:

- P5 negotiate the availability of people and other resources that you need to implement your customer service delivery plans
- P6 develop specific, measurable and realistic targets for the staff who deliver customer service
- P7 ensure that planned resources are available when required
- P8 brief staff on their objectives and targets
- P9 encourage feedback from staff and customers and use their feedback to modify objectives and targets
- P10 collect and analyse feedback from customers and staff on customer service operations
- P11 evaluate how effectively agreed outcomes and processes are being achieved
- P12 modify your plans for customer service operations in the light of your evaluation

Deal with problems relating to customer service operations

You must be able to:

- P13 collect information on the nature of the problem and assess the likely impact on the customer
- P14 identify the causes of the problem and possible solutions
- P15 evaluate possible solutions against customer expectations and organisational needs
- P16 select and implement an acceptable solution with the minimum possible disruption to customers
- P17 monitor the implementation of the solution and, where necessary, make adjustments

CFACSB13

Plan, organise and control customer service operations

Knowledge and understanding

You need to know and understand:

- K1 how to develop plans for customer service operations and what these plans should contain
- K2 how to identify and work within allocated budgets and time targets for customer service operations
- K3 the types of contingencies that may occur during customer service operations, how to assess their risks and plan how to deal with them
- K4 the types of monitoring methods you can use and the criteria you should select to evaluate the effectiveness of customer service operations
- K5 how to develop objectives and targets for staff
- K6 the importance of briefing staff and how to do so effectively
- K7 the importance of monitoring the quality of your customer service operations
- K8 the types of problems that are likely to occur in your customer service operations and how to plan for dealing with these
- K9 the importance of liaising with customers and colleagues about problems and possible solutions
- K10 how to identify and evaluate possible solutions
- K11 the different sources of information available, including the internet and social media, and the opportunities they present for monitoring information about customers

CFACSB13

Plan, organise and control customer service operations

Developed by	Skills CFA
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Version number	2
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Date approved	January 2013
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Indicative review date	January 2016
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Validity	Current
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Status	Original
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Originating organisation	Skills CFA
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Original URN	CFACSB13
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Relevant occupations	Customer Service Occupations
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Suite	Customer Service (2013)
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Key words	Delivery; customer loyalty; monitoring; solving problems; positive impression; customer service; communication; problem solving; behaviours; work with others; giving information; teamwork; receiving information services; products
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Overview

This Standard 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.

People managing customer service need to know how effectively it is being delivered. Without this information, they have no way of knowing if their customers are satisfied and are likely to remain loyal. They also need to know what to do to improve customer service to meet and exceed customer expectations. This Standard is about planning how you measure standards of customer service by collecting and analysing information. You must develop conclusions and recommendations and then report your findings to relevant people. Most of all, this Standard is about approaching the review of customer service quality systematically and making full use of your findings.

CFACSB14

Review the quality of customer service

Performance criteria

Plan how to measure customer service

You must be able to:

- P1 identify the features of customer service delivery that affect customer satisfaction
- P2 plan how you will monitor the features of customer service delivery that affect customer satisfaction
- P3 plan how you will analyse the information you have collected

Collect and analyse information on customer service

You must be able to:

- P4 implement your plans for monitoring customer service processes and outcomes
- P5 analyse the monitoring information you have collected
- P6 compare the conclusions of your analysis with the criteria you identified
- P7 adapt your plans if the agreed methods of collecting and analysing information are not proving effective
- P8 communicate the results of your measurement of customer service to colleagues
- P9 agree actions to improve customer service that result from your measurements and analysis

CFACSB14

Review the quality of customer service

Knowledge and understanding

You need to know and understand:

- K1 the importance of measuring the quality of customer service
- K2 how to identify which aspects of the customer service process affect customer satisfaction
- K3 how to select the criteria you will use for measurement of customer service
- K4 how to construct representative samples
- K5 the types of information collection methods you could use
- K6 how to make use of all available sources of information and feedback about service quality including what is available through social media
- K7 methods of analysing information on the quality of customer service
- K8 how to identify recommendations that flow from your measurement of customer service.
- K9 the procedures for making recommendations on customer service improvements within your organisation

CFACSB14

Review the quality of customer service

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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSB14
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Delivery; quality; expectations; planning; collecting; analysing; measuring; customer service; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information services; products

Overview

This Standard 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.

Building and developing effective customer relations is a vital aspect of customer service. Strong customer relations will help your organisation to identify and understand your customers' expectations, encourage a way of working that is based on partnership and mutual trust, and establish and maintain customer loyalty. This Standard is about establishing and maintaining effective customer relations. For some organisations this means encouraging loyalty and repeat business from large numbers of customers. For others it is all about nurturing and relating to a smaller number of valued customers who make an important strategic contribution to your organisation's success. This Standard is for you only if you are in a position to influence the way your organisation determines the level of service offered to different customers.

CFACSB15

Build and maintain effective customer relations

Performance criteria

Establish effective customer relations

You must be able to:

- P1 identify the types of customers with whom you should build longer term customer relations and promote loyalty
- P2 communicate with these customers so that they know they are important to your organisation
- P3 explain your role, the purpose of making contact and the mutual benefits of building a longer term relationship with customers
- P4 make it clear that you welcome two-way communication about customer expectations

Maintain and develop effective customer relations

You must be able to:

- P5 keep customers informed and accept criticism from customers openly and constructively
- P6 regularly assess whether customer expectations are being consistently met
- P7 use your influence and authority in your own organisation to ensure that customer needs and expectations are being met and, where possible, exceeded
- P8 collect feedback from customers and staff to ensure that solutions are being provided that result in customer satisfaction
- P9 analyse customer relations and propose changes that will develop longer term loyalty to people with authority in your organisation

CFACSB15

Build and maintain effective customer relations

Knowledge and understanding

You need to know and understand:

- K1 how to identify and prioritise types of customers with whom you should be building a longer term relationship
- K2 the most appropriate method of establishing relationships with customers targeted for longer term relationships
- K3 the importance of effective communication skills when dealing with customers
- K4 how to explore and agree with customers the mutual benefits of maintaining and developing a longer term relationship
- K5 how to communicate with customers, especially when they are dissatisfied with services or products
- K6 how to negotiate with customers in a way that balances their expectations with the expectations of your organisation
- K7 the types of compromises that would be acceptable to your organisation when meeting customer expectations
- K8 how to use your influence and authority in your organisation to meet or exceed customer expectations
- K9 methods of monitoring customer satisfaction appropriate to your level of authority in the organisation
- K10 the part played by internet contact and social media and the potential this offers for building and maintaining effective customer relations

CFACSB15

Build and maintain effective customer relations

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Originating organisation	Skills CFA
Original URN	CFACSB15
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	customer relationships; building relationships; loyalty; influence; customer service; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information services; products

Overview

This Standard 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.

Excellent customer service is a team effort. You cannot win and maintain the loyalty of customers without pulling together with all the other staff who help to organise the delivery of services or products, interface with the customer or provide back-up to customer service activities. The team probably includes colleagues, senior managers and service partners who are working in other departments or outside organisations but still contribute to customer service delivery. To achieve your organisation's aims and objectives for customer service you will need to have effective working relationships with all of these – especially when you urgently need their co-operation and support.

CFACSB16

Deliver seamless customer service with a team

Performance criteria

Build effective working relationships with colleagues

You must be able to:

- P1 identify and agree with colleagues team strategies for delivering seamless customer service
- P2 share information and knowledge to improve customer service
- P3 encourage, accept and respond positively to feedback from colleagues on customer service performance
- P4 work with colleagues to deal with conflict constructively
- P5 review teamwork strategies for delivering seamless customer service with colleagues

Build effective relationships with service partners

You must be able to:

- P6 identify the service partners who are most significant to delivery of seamless customer service
- P7 take opportunities to establish and develop effective working relationships with service partners
- P8 ensure that your commitments to service partners and their commitments to you are being fulfilled as agreed
- P9 communicate clearly and in good time with service partners on issues that affect them and your customers
- P10 work together with service partners to resolve customer service problems
- P11 work together with service partners to deal with conflict constructively

CFACSB16

Deliver seamless customer service with a team

Knowledge and understanding

You need to know and understand:

- K1 how to analyse the contribution and roles of colleagues and service partners when delivering customer service
- K2 the types of support you could provide to colleagues and service partners and they could provide to you to deliver seamless customer service
- K3 the benefits and challenges of collaborative working, what may go wrong and how to prepare for this
- K4 the value and importance of effective communication with colleagues and service partners
- K5 the types of behaviours that show you have a relationship of respect and honesty with colleagues and service partners
- K6 how to deal with conflict constructively

CFACSB16

Deliver seamless customer service with a team

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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSB16
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	team work; delivery; maintain loyalty; work with others; team; working relationships; co-operation; support

CFACSB17

Deliver customer service in an environmentally friendly and sustainable way



Overview

This Standard 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.

Environmental awareness and positive action on sustainability form an important part of the culture and strategy in many organisations. Those organisations have devised policies to ensure that they gain the approval of customers and other stakeholders by promoting a sustainable approach to their services or products. An ethical approach to the environment can enhance the organisation's reputation. This approach is achieved only if those delivering the service follow guidelines and procedures in order to display personal and organisational commitment to the environment and sustainability. This Standard addresses the balances that must be found when delivering customer service while meeting environmental standards. The Standard is appropriate for you if your organisation has a clear commitment to sustainability and if aspects of your job role make a direct contribution to that.

CFACSB17

Deliver customer service in an environmentally friendly and sustainable way

Performance criteria

Follow organisational policies and procedures to deliver customer service in an environmental and sustainable way

You must be able to:

- P1 encourage customers to contribute to your organisation's environmental policies
- P2 keep customers informed about your organisation's environmentally friendly and sustainable policies
- P3 contribute to activities and actions to improve your organisation's environmentally friendly approach
- P4 follow your organisation's procedures to promote environmentally friendly and sustainable approaches when dealing with service partners
- P5 keep service partners informed about your organisation's environmentally friendly and sustainable policies

Contribute to the development of environmentally friendly and sustainable customer service procedures

You must be able to:

- P6 identify opportunities for energy and carbon emission savings when following organisational customer service procedures
- P7 identify opportunities for waste management improvements when following organisational customer service procedures
- P8 follow organisational procedures to inform those with appropriate authority of opportunities to improve environmental aspects of customer service
- P9 work with colleagues to implement environmental improvements in customer service
- P10 communicate with customers about environmental improvements in customer service

CFACSB17

Deliver customer service in an environmentally friendly and sustainable way

Knowledge and understanding

You need to know and understand:

- K1 principles of environmental practices and on-going sustainability that are relevant to customer service operations
- K2 organisational policies that link environmental issues with customer service
- K3 principles of energy saving and reducing carbon emissions
- K4 principles of waste management relevant to your organisation
- K5 the environmental issues and risks represented by your organisation's services or products
- K6 your organisation's procedures for energy, carbon emission and waste management
- K7 how to keep customers informed about your organisation's environmental policies and procedures
- K8 how to work with service partners to promote environmental and sustainable benefits
- K9 organisational procedures for passing on ideas for environmental improvements
- K10 the importance of having appropriate authority for implementing changes in customer service procedures
- K11 the importance of recognising that environmental actions involve cost for your organisation

CFACSB17

Deliver customer service in an environmentally friendly and sustainable way

Developed by	Skills CFA
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Version number	1
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Date approved	January 2013
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Indicative review date	January 2016
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Validity	Current
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Status	Original
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Originating organisation	Skills CFA
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Original URN	CFACSB17
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Relevant occupations	Customer Service Occupations
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Suite	Customer Service (2013)
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Key words	customer service delivery; customer service behaviours and processes; environmental awareness; positive action on sustainability
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Overview

This Standard 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.

This Standard is all about how you deliver consistent and reliable service to customers. As well as being good with people, you need to work with your organisation's service systems to meet or exceed customer expectations. In your job there will be many examples of how you combine your approach and behaviour with your organisation's systems. You need to prepare for each transaction with a customer, deal with different types of customers in different circumstances and check that what you have done has met customer expectations. To meet this standard you have to deliver excellent customer service over and over again.

CFACSB2

Deliver reliable customer service

Performance criteria

Prepare to deal with your customers

You must be able to:

- P1 keep your knowledge of your organisation's services or products up-to-date
- P2 ensure that the area you work in is tidy, safe and organised efficiently
- P3 prepare and arrange everything you need to deal with your customers before your shift or period of work commences

Give consistent service to customers

You must be able to:

- P4 make realistic customer service promises to your customers
- P5 ensure that your promises balance the needs of your customers and your organisation
- P6 keep your promises to your customers
- P7 inform your customers if you cannot keep your promises due to unforeseen circumstances
- P8 recognise when your customers' needs or expectations have changed and adapt your service to meet their new requirements
- P9 keep your customers informed if delivery of the service needs to involve passing them on to another person or organisation

Check customer service delivery

You must be able to:

- P10 check that the service you have given meets your customers' needs and expectations
- P11 identify when you could have given better service to your customers and how your service could have been improved
- P12 share information with colleagues and service partners to maintain and improve your standards of service delivery.

CFACSB2

Deliver reliable customer service

Knowledge and understanding

You need to know and understand:

- K1 your organisation's services or products
- K2 your organisation's procedures and systems for delivering customer service
- K3 methods or systems for measuring an organisation's effectiveness in delivering customer service
- K4 your organisation's procedures and systems for checking service delivery
- K5 your organisation's requirements for health and safety in your area of work

CFACSB2

Deliver reliable customer service

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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSB2
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Reliability; delivery; service systems; customer expectations; efficiency; balance needs; customer service; communication; problem solving; behaviours; work with others; teamwork

CFACSB3

Deliver customer service on your customer's premises



Overview

This Standard 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.

Many organisations deliver a service to their customers on the customer's own premises. This requires sensitive handling as people are particularly protective about their own personal space. In this situation there is always the potential to detract from excellent customer service by using inappropriate language or behaviour or even by causing accidental damage to your customer's property. This Standard is about the process of providing a service on customer premises whilst ensuring that your customer both enjoys the customer service experience and has confidence that the work you have carried out has been completed successfully. This Standard is not simply about working in a different building. Your customer must be somebody who feels real ownership of the premises and is therefore somewhat protective about them. In particular, this Standard is for you if your job takes you into your customers' homes.

CFACSB3

Deliver customer service on your customer's premises

Performance criteria

Establish a rapport with your customer

You must be able to:

- P1 prepare for a visit to your customer's premises and ensure they know when and why you will be there
- P2 identify yourself to your customer showing official identification whenever possible
- P3 show a positive and friendly approach to the service you are about to give
- P4 use language and behaviour that show respect for your customer
- P5 explain to your customer exactly what you are going to do and approximately how long you expect the work to take
- P6 listen to any concerns that your customer may have and reassure them
- P7 keep your customer informed of progress and about any cause for delay that might take place
- P8 keep your customer informed of any variation to the work that could involve additional time or cost
- P9 consult your customer when you have to do work that they had not expected

Combine customer service with your other skills and expertise

You must be able to:

- P10 show respect to your customer's premises and possessions by treating them with care
- P11 make sure your customer is aware of your specialist technical skills
- P12 take time to give your customer confidence in your knowledge and skills
- P13 consider the customer service implications of each action and inform your customer of what will be involved
- P14 inform your customer when you have finished and reinforce how the work has been handled professionally
- P15 check that your customer is satisfied with the work and listen carefully to any feedback
- P16 inform your customer of timescales if any follow up work is involved
- P17 ensure that timescales for follow up work are kept
- P18 keep your customer informed if timescales for follow up work are not going to be met
- P19 explain clearly to your customer why you cannot do work that is not specified in the service offer
- P20 ensure that your customer has the appropriate details to contact your organisation if they need to

CFACSB3

Deliver customer service on your customer's premises

Knowledge and understanding

You need to know and understand:

- K1 what you can do to establish a rapport with customers
- K2 the importance of sensitivity to people's feelings about their own premises and possessions
- K3 the regulatory and legal restrictions on what you can and cannot do in all aspects of your work
- K4 the insurance implications of working on your customer's premises
- K5 the organisational procedures to follow if you cause any accidental damage on your customer's premises

CFACSB3

Deliver customer service on your customer's premises

Developed by	Skills CFA
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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSB3
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Delivery; premises; homes; customer service; communication; problem solving; behaviours; work with others; team working

CFACSB4

Recognise diversity when delivering customer service



Overview

This Standard 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.

Many customer service situations involve dealing with diverse groups of people inclusively and with respect. Responses to diversity can lead to discrimination that might or might not be deliberate. Discrimination can result from simply not knowing the beliefs and preferences of different groups or may result from actions based on stereotyping rather than on solid evidence obtained from your customer. This Standard is about how you establish your customer's expectations and needs in a way that takes full account of them as an individual. The Standard also covers the way you provide customer service to diverse groups of customers each of which has common likes and dislikes.

CFACSB4

Recognise diversity when delivering customer service

Performance criteria

Respect customers as individuals and promote equality in customer service

You must be able to:

- P1 observe verbal and non-verbal clues that provide information about your customer's expectations and needs
- P2 identify and avoid features of stereotypes that might be applied to your customer and could carry the risk of causing offence
- P3 identify aspects of your customer's appearance or communication which risk leading you to treat them differently
- P4 consider aspects of your customer's appearance or communication in the light of your own beliefs about various groups of people that include your customer
- P5 question your customer to ensure that the impressions you are forming about their expectations and wishes are based on sound evidence
- P6 adjust your interpretation of your customer's expectations and wishes as a result of further evidence you have collected by talking to your customer

Adapt customer service to recognise the different needs and expectations of diverse groups of customers

You must be able to:

- P7 follow organisational procedures and guidelines that seek to make customer service inclusive for diverse groups of customers
- P8 show respect for your customer's individual beliefs, expectations and needs that may result from their membership of a particular group
- P9 vary your approach to your customer to take account of their beliefs, expectations and needs that result from their membership of a particular group
- P10 work with colleagues to identify consistent approaches that team members should adopt when dealing with a particular group

CFACSB4

Recognise diversity when delivering customer service

Knowledge and understanding

You need to know and understand:

- K1 the importance of recognising diversity in relation to legal, regulatory, ethical and social requirements
- K2 reasons why consideration of diversity and inclusion issues affect customer service
- K3 organisational guidelines to make customer service inclusive for diverse groups of customers
- K4 how to observe and interpret non-verbal clues
- K5 how to listen actively for clues about your customer's expectations and needs
- K6 techniques for obtaining additional information from customers through tactful and respectful questions
- K7 behaviour that might cause offence to specific groups of people to whom you regularly provide customer service
- K8 how to impress specific groups of people to whom you regularly provide customer service

CFACSB4

Recognise diversity when delivering customer service

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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSB4
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Diversity; recognition; discrimination; beliefs; preferences; stereotyping; customer expectations; individual; customer service; communication; problem solving; behaviours; work with others; teamwork

Overview

This Standard 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.

Customer service is frequently delivered across a language divide. Customer service centres may be located in one country but deal mainly with another. In a multi-cultural society many customers may have a different first language from those who are delivering customer service. This language divide can present a challenge to those who deliver customer service. This Standard is about preparing to deliver customer service across a language divide and seeing through that delivery. The Standard covers the steps that are needed to deal with customers with different language preferences without having full access to your customer's first language. You should choose this Standard if you frequently deal across a language divide. Do not choose this Standard if you come across customers who do not share your first language only occasionally.

CFACSB5

Deal with customers across a language divide

Performance criteria

Prepare to deal with customers with a different first language

You must be able to:

- P1 identify the language or languages other than your own that you are most likely to come across when dealing with customers
- P2 learn a greeting, an expression of thanks and a farewell phrase in the language you expect to encounter
- P3 identify a source of assistance with a language you expect to encounter when delivering customer service
- P4 agree with colleagues informal signing options that may be used for key aspects of your services or products when dealing with somebody with a different first language
- P5 log useful words and phrases to support your dealings with a customer with a different first language
- P6 learn an appropriate phrase to explain to your customer in their first language that you do not speak that language fluently

Deal with customers who speak a different first language from your own

You must be able to:

- P7 identify your customer's first language and indicate to them that you are aware of this
- P8 establish the expectations of your customer regarding whether they expect to deal in your first language or theirs
- P9 speak clearly and slowly if using a language which is not the first language for either you or your customer
- P10 maintain a consistent tone and volume when dealing with somebody across a language divide
- P11 listen closely to your customer to identify any words they may be using in a way that differs from the way you would generally use the same words
- P12 check your understanding of specific words with your customer using questions for clarification
- P13 seek appropriate assistance from colleagues if you are unable to complete a customer transaction because of language barriers
- P14 reword a question or explanation if your customer clearly does not understand your original wording
- P15 use a few words of your customer's first language to create a rapport

CFACSB5

Deal with customers across a language divide

Knowledge and understanding

You need to know and understand:

- K1 which languages you are most likely to encounter among groups of your customers
- K2 how to greet, thank and say farewell to customers in their first languages
- K3 the importance of dealing with customers in their first language if possible
- K4 how to explain to a customer that you cannot hold an extended conversation in their first language
- K5 the importance of tone, pace and volume when dealing with customers across a language divide
- K6 possible sources of assistance to use when a language barrier demands additional language skills

CFACSB5

Deal with customers across a language divide

Developed by	Skills CFA
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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSB5
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Meeting; greeting conversation; language barrier; language; first language; language divide; words; phrases; tone; volume; customer service; communication; problem solving; behaviours; work with others; teamwork

CFACSB6

Use questioning techniques when delivering customer service



Overview

This Standard 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.

This Standard is about how you use questioning both in planned sequences and in spontaneous conversation to paint a picture of what your customer wants and how your organisation can deliver it. This Standard is for you if you come into contact with your customer face to face, by voice technology or on-line with immediate interaction. This Standard is probably not for you if you deal with customers remotely when it takes time to exchange questions and responses.

CFACSB6

Use questioning techniques when delivering customer service

Performance criteria

Establish rapport and identify customer concerns

You must be able to:

- P1 greet your customer sincerely and invite a full and open response
- P2 use planned or spontaneous lines to indicate to your customer that you empathise with their initial enquiry
- P3 invite more detailed explanation from your customer
- P4 listen closely to your customer's responses to strengthen your understanding of their concerns
- P5 use both open and closed questions to make appropriate connection with your customer and open the door to more detailed investigation
- P6 identify and note your customer's feelings and mood in relation to the information you are seeking

Seek detailed information from customers using questioning techniques

You must be able to:

- P7 follow a planned trail of questions to explore in detail customer concerns you have already identified
- P8 hold a spontaneous conversation with your customer to explore in detail customer concerns you have already identified
- P9 explain to your customer why you need the information you are asking for
- P10 use probing and searching questions that draw on comments or words used by your customer
- P11 thank your customer for the information in a way that encourages further open responses
- P12 follow organisational procedures to record your customer responses to inform future actions

CFACSB6

Use questioning techniques when delivering customer service

Knowledge and understanding

You need to know and understand:

- K1 why establishing rapport makes it easier to draw information from customers
- K2 ways to greet customers that immediately build rapport
- K3 reasons for using planned question patterns to draw out particular information
- K4 reasons for using spontaneous conversation to draw out particular information
- K5 the importance of active listening when seeking detailed information from customers
- K6 the differences between and uses of closed and open questions
- K7 the importance of explaining to customers why information is needed
- K8 why particular trigger questions are effective in gaining specific information
- K9 how to question and respond effectively using a chosen channel of communication or social media platform

CFACSB6

Use questioning techniques when delivering customer service

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Date approved	January 2013
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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSB6
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Questioning; delivery; conversation; rapport; closed questions; open questions; customer service; communication; problem solving; behaviours; work with others; teamwork

Overview

This Standard 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.

Customer service is often delivered using bespoke software when dealing with customers face-to-face, by telephone or on-line. For the process to be effective, you must be able to navigate the system quickly by directly following recommended routes and using all the functionality of the system. Customers are unaware of the details of the system you are using and they must be kept informed of the different steps you are taking. Your use of the system must also ensure that you keep appropriate records of the transaction so that it can proceed successfully through the next stages. Most of all, customer satisfaction must drive the interaction and it should not appear to be dominated by the demands of the software. This Standard is for you if you are responsible for delivering service to customers at the same time as operating bespoke service software. Do not choose this Standard if you do not make regular use of a bespoke software system when dealing with customers.

CFACSB7

Deal with customers using bespoke software

Performance criteria

Prepare to deliver customer service using bespoke software

You must be able to:

- P1 sign on and open access to appropriate functions in the IT system
- P2 navigate the architecture and geography of the customer service site to ensure you can access all appropriate areas
- P3 explore screen or menu routes that are most appropriate for the customer service you are seeking to deliver
- P4 ensure that you are familiar with the software manual, help screens or help lines to know where to locate technical support when needed
- P5 prepare your work area to deliver customer service using bespoke software

Deliver customer service using bespoke software

You must be able to:

- P6 identify your customer or the services or products they wish to access
- P7 follow organisational procedures to step through the system in a way that responds to your customer's needs
- P8 use search or other specialist functions within the software to respond to customer requests
- P9 enter new records using the bespoke software system
- P10 amend customer service records in the bespoke software system
- P11 communicate with your customers in terms they can understand relating to the software system
- P12 follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software
- P13 interpret error messages and act on them to support your customer service
- P14 refer your customer to a colleague following organisational procedures if you are unable to complete the transaction

CFACSB7

Deal with customers using bespoke software

Knowledge and understanding

You need to know and understand:

- K1 access and sign-on routines for the bespoke software system
- K2 the architecture and geography of the bespoke software system
- K3 different screen or menu routes that can be followed to meet customer requirements
- K4 sources of support and help for the bespoke software including manuals, help screens and help lines
- K5 the importance of preparing a work area before delivering customer service
- K6 search or other enquiry facilities within the bespoke software system
- K7 the importance of avoiding jargon and system terminology when communicating with customers
- K8 ways to respond to error messages when using a bespoke software system
- K9 referral points and sources of information when you are unable to meet customer needs using the bespoke software system
- K10 links between the bespoke software system and open networks or social media platforms that may be appropriate for communication with your customers

CFACSB7

Deal with customers using bespoke software

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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSB7
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	bespoke software; contact centres; telephone; on-line; functionality; customer service; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information services; products

CFACSB8

Maintain customer service through effective handover



Overview

This Standard 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.

Customer service delivery in a team involves many situations when you are unable to see actions through and you pass on responsibility to a colleague. This sharing of responsibility should be organised and follow a recognised pattern. Most of all you need to be sure that, when responsibility is passed on, the actions are seen through. This involves routinely checking with your colleagues that customer service actions have been completed. This Standard is for you if your job involves service delivery as part of a team and you regularly pass on responsibility for completion of a customer service action to a colleague.

CFACSB8

Maintain customer service through effective handover

Performance criteria

Agree joint responsibilities in a customer service team

You must be able to:

- P1 identify services or products you are involved in delivering that rely on effective teamwork
- P2 identify steps in the customer service delivery process that rely on exchange of information between you and your colleagues
- P3 agree with colleagues when it is right to pass responsibility for completing a customer service action to another
- P4 agree with colleagues how information should be exchanged between you to enable another to complete a customer service action
- P5 identify ways of reminding yourself when you have passed responsibility to a colleague for completing a customer service action

Check that customer service actions are seen through by working together with colleagues

You must be able to:

- P6 access reminders to identify when to check that a customer service action has been completed
- P7 ensure that you are aware of all details of customer service actions your colleague was due to complete
- P8 ask your colleague about the outcome of their completing the customer service action as agreed
- P9 identify the next customer service actions if your colleagues has been unable to complete the actions you had previously agreed
- P10 work with colleagues to review the way in which customer service actions are shared

CFACSB8

Maintain customer service through effective handover

Knowledge and understanding

You need to know and understand:

- K1 your organisation's customer service procedures for the services or products you are involved in delivering
- K2 the appropriate colleagues to pass responsibility to for completing particular customer service actions
- K3 ways of ensuring that information is passed between you and your colleagues effectively
- K4 organisational procedures and acceptable communication media and platforms for passing information to colleagues
- K5 ways to remind yourself of actions that need to be checked when you have passed on responsibility to a colleague
- K6 the importance of checking tactfully with a colleague whether they have completed the customer service actions you were expecting
- K7 opportunities for contributing to review the way customer service actions are shared in customer service processes

CFACSB8

Maintain customer service through effective handover

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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSB8
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Delivery; responsibility; colleagues; working together; customer service; communication; problem solving; behaviours; work with others; giving information; teamwork; receiving information services; products

Overview

This Standard 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.

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 Standard 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. Do not choose this Standard if you have difficulty identifying a service chain that relies on you in your role developing effective service partnerships.

CFACSB9

Deliver customer service using service partnerships

Performance criteria

Work effectively within a customer service chain

You must be able to:

- P1 explain who is involved in the service chain that supplies your end user customers
- P2 identify which of those involved in your service chain is internal and which is external to your organisation
- P3 explain how the way you work with individual service partners contributes to an overall service chain
- P4 use the principles and practices applied to external customers to deliver excellent customer service to internal customers
- P5 work with internal customers and internal or external suppliers in the service chain to improve service to external customers
- P6 communicate effectively with internal customers to ensure that they are aware of any aspects of your work that might affect them

Build and nurture positive relationships in a customer service chain

You must be able to:

- P7 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
- P8 identify where power and authority exist within the service chain
- P9 negotiate with internal customers and internal or external suppliers to establish service procedures that are acceptable to all and contribute to excellent customer service
- P10 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
- P11 work with colleagues to develop and maintain awareness that a team within a service chain cannot work in isolation
- P12 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

CFACSB9

Deliver customer service using service partnerships

Knowledge and understanding

You need to know and understand:

- K1 the responsibilities and rights that can be built into an internal customer/supplier relationship
- K2 the benefits and drawbacks of describing a relationship in a service chain as a supplier/customer relationship or a service partnership
- K3 how to establish priorities if internal customer demands conflict with external customer demands
- K4 how to maintain team identity whilst working constructively with other teams to deliver excellent customer service
- K5 how to negotiate successfully with internal customers or suppliers
- K6 the formal and informal structures of the organisation and how they can influence relationships
- K7 how to use all available sources of information about strategic service partners and social media to develop positive working relationships

CFACSB9

Deliver customer service using service partnerships

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Date approved	January 2013
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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSB9
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	service partnerships; service chain; internal customer; external customer; suppliers; build relationships; understanding; customer service; communication; problem solving; behaviours; work with others; giving information; teamwork; receiving

CFACSC1

Recognise and deal with customer queries, requests and problems



Overview

This Standard 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.

No matter how good you are at providing consistent and reliable customer service, some of your customers will from time to time expect more. They can signal this in various ways and when they do you must know how to handle it. Sometimes customers ask different questions and request special treatment. You may be able to help them yourself and you certainly need to know who to ask for help if necessary. Some customers may be dissatisfied with the service and may present a problem. Your job is to recognise that there is a problem and make sure that the appropriate person deals with it.

CFACSC1

Recognise and deal with customer queries, requests and problems

Performance criteria

Recognise and deal with customer queries and requests

You must be able to:

- P1 deal with queries and requests from customers in a positive and professional way
- P2 seek information or help from a colleague if you cannot answer your customer's query or request
- P3 obtain help from a colleague if you are not able to deal with your customer's request
- P4 always tell your customer what is happening

Recognise and deal with customer problems

You must be able to:

- P5 recognise when something is a problem from the customer's point of view
- P6 not say or do anything which may make the problem worse
- P7 deal with a challenging customer calmly and confidently
- P8 recognise when to pass a problem on to an appropriate colleague
- P9 pass the problem on to your colleague with the appropriate information
- P10 check that the customer knows what is happening

CFACSC1

Recognise and deal with customer queries, requests and problems

Knowledge and understanding

You need to know and understand:

- K1 who in the organisation is able to give help and information
- K2 limits of what they are allowed to do
- K3 what professional behaviour is
- K4 how to speak to people who are dissatisfied
- K5 how to deal with customers who are more demanding
- K6 what customers normally expect
- K7 how to recognise a problem from what a customer says or does
- K8 how to recognise a problem expressed by a customer through social media
- K9 what kinds of behaviours/actions would make situations worse
- K10 the organisational procedures you must follow when you deal with problems or complaints
- K11 the types of behaviour that may make a problem worse

CFACSC1

Recognise and deal with customer queries, requests and problems

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Originating organisation	Skills CFA
Original URN	CFACSC1
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	customer queries; customer requests; customer problems; recognition; customer expectations; dissatisfaction; customer service; communication; problem solving; behaviours; work with others; giving information; teamwork; receiving information

Overview

This Standard 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.

However good the customer service of your organisation is, some problems will occur. You may not have the authority or experience to deal with the problem yourself so it is important to collect helpful information for those who will deal with it. You need to be able to identify that there is a problem, discover detailed information about that problem and pass on the information so that the problem can be tackled. This Standard is about how to collect information about a customer service problem, pass it to the right people in your organisation and keep your customer informed about what is being done.

CFACSC2

Take details of customer service problems

Performance criteria

Respond to customers who raise a problem

You must be able to:

- P1 recognise when your customer is raising a problem
- P2 respond to your customer calmly and helpfully
- P3 take details that will identify your customer

Gather details from customers who raise a problem

You must be able to:

- P4 ask your customer questions to clarify what has or has not happened to cause a problem
- P5 check your understanding of what your customer sees as the problem
- P6 ask your customer questions to clarify their expectations about the service or product that is now causing a problem
- P7 note the details of what your customer tells you about the problem
- P8 confirm with your customer details of what they have told you about the problem

Pass details of problems raised by customers to the colleague who can deal with them

You must be able to:

- P9 collect details of any sources of information which your organisation uses to identify a customer transaction that is now causing a problem
- P10 gather any other details that are relevant to resolving the problem from colleagues, customer service records or product specifications
- P11 tell your customer what you will do with the details of the problem so that action is taken
- P12 tell your customer what to expect without making customer service promises that may not be met
- P13 pass the details to a colleague who is able to deal with the problem

CFACSC2

Take details of customer service problems

Knowledge and understanding

You need to know and understand:

- K1 customer expectations of your organisation's services or products that may cause problems if they are not met
- K2 how to respond to customers who raise problems in a way that they will find calm and helpful
- K3 reference codes or identifiers your organisation uses to identify customers
- K4 what questions can be used to gather information that will be most helpful in resolving a problem
- K5 details your organisation needs to resolve a problem
- K6 details your organisation uses to identify specific customer transactions
- K7 the appropriate colleagues to whom you should pass details of problems
- K8 your organisation's preferences for the way in which you should pass on details of problems
- K9 how to collect details of customer service problems expressed through social media

CFACSC2

Take details of customer service problems

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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSC2
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	handling problems; collect information; identify problems; customer service; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information services; products

Overview

This Standard 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.

This Standard is about what to do when it is difficult to meet customer expectations. Even if the service you give is excellent, some customers experience problems. Part of your job is to help to resolve those problems. There is likely to be a problem if customer expectations are not met. This may be because your customer's expectations involve more than you can offer or because your service procedures have not been followed. Some problems are reported by customers and sometimes you spot the problem first and resolve it before your customer has even noticed. As soon as you are aware of a problem, you need to consider the options and then choose a way to put it right. This Standard is particularly important in customer service because many customers judge how good the customer service of your organisation is by the way problems are handled.

CFACSC3

Resolve customer service problems

Performance criteria

Spot customer service problems

You must be able to:

- P1 listen carefully to your customers about any problem they have raised
- P2 ask your customers about the problem to check your understanding
- P3 recognise repeated problems and alert the appropriate authority
- P4 share customer feedback with others to identify potential problems before they happen
- P5 identify problems with systems and procedures before they begin to affect your customers

Pick the best solution to resolve customer service problems

You must be able to:

- P6 identify the options for resolving a customer service problem
- P7 choose the most effective method of communication for dealing with your customer when resolving a customer service problem
- P8 work with others to identify and confirm the options to resolve a customer service problem
- P9 work out the advantages and disadvantages of each option for your customer and your organisation
- P10 pick the best option for your customer and your organisation
- P11 identify for your customer other ways that problems may be resolved if you are unable to help

Take action to resolve customer service problems

You must be able to:

- P12 discuss and agree the options for solving the problem with your customer
- P13 take action to implement the option agreed with your customer
- P14 work with others and your customer to make sure that any promises related to solving the problem are kept
- P15 keep your customer fully informed about what is happening to resolve the problem
- P16 check with your customer to make sure the problem has been resolved to their satisfaction
- P17 give clear reasons to your customer when the problem has not been resolved to their satisfaction

CFACSC3

Resolve customer service problems

Knowledge and understanding

You need to know and understand:

- K1 organisational procedures and systems for dealing with customer service problems
- K2 how to defuse potentially stressful situations
- K3 how to negotiate
- K4 the limitations of what you can offer your customer
- K5 types of action that may make a customer problem worse and should be avoided
- K6 how to choose the most effective method of communication when dealing with customer service problems
- K7 how to make best use of remote communications with customers through social media when resolving customer problems

CFACSC3

Resolve customer service problems

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Originating organisation	Skills CFA
Original URN	CFACSC3
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	handling problems; resolving problems; customer expectations; choosing options; customer service; communication; problem solving; behaviours; work with others; giving information; teamwork; receiving information services; products

Overview

This Standard 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.

Many organisations have a significant proportion of customers who are challenging to deal with. Your customer's attitude may be challenging because they believe that a threat or problem exists before they have contacted your organisation. They may become worried or angry when they discover that their expectations are not going to be met by your organisation. They may be very concerned or nervous about the outcome of dealing with your organisation. In either case, they are challenging to deal with and need your understanding. This Standard is about dealing directly with these customers and trying to reach a resolution that satisfies everybody or at least reduces the risk of dissatisfaction. You should choose this Standard only if you recognise the content as applying to a reasonable proportion of your exchanges with customers. Do not choose this Standard if it will be hard to find evidence because you only occasionally deal with customers you find challenging.

CFACSC4

Deliver customer service to challenging customers

Performance criteria

You must be able to:

Recognise when customers may be challenging to deal with

- P1 recognise types of customer behaviour that are challenging to deal with
- P2 identify aspects of your organisation's services or products that make it challenging to deal with customers
- P3 identify the signs and signals that indicate a customer may be challenging to deal with
- P4 put yourself in your customer's position and see the situation from their point of view
- P5 identify reasons why your customers may be behaving in a way that is challenging to deal with
- P6 recognise the limits of challenging customer behaviour that your organisation will tolerate
- P7 identify things that you may do or say that will provoke challenging responses from your customer

Deal with customers who are challenging

You must be able to:

- P8 listen patiently to what your customer wants to tell you
- P9 use direct and factual questions about your customer's feelings and what has happened to identify what might satisfy them
- P10 check your understanding of your customer's concerns by describing your view of the situation and options that might be available
- P11 express empathy with your customer without necessarily admitting fault on the part of your organisation
- P12 give clear statements or explanations of your organisation's position
- P13 agree a way forward that balances customer satisfaction with the needs of your organisation
- P14 enlist help from colleagues if options for action are outside of your authority
- P15 summarise clearly actions to be taken and reasons for those actions to complete the customer transaction
- P16 advise your manager or the appropriate colleagues if your customer is likely to re-open the matter with them
- P17 take any necessary action to protect your own safety or that of other customers or colleagues when dealing with a customer who is challenging or difficult

CFACSC4

Deliver customer service to challenging customers

Knowledge and understanding

You need to know and understand:

- K1 the types of customer behaviour that you personally find challenging to deal with
- K2 reasons why some aspect of your organisation's services or products may provoke challenging behaviour from customers
- K3 reasons why your customer's own actions may cause them to behave in a way that is challenging to deal with
- K4 the meaning of having empathy for a customer's feelings
- K5 who can be asked for help when dealing with a challenging customer
- K6 the differences between assertive, aggressive and passive behaviour
- K7 the importance of not simply quoting your organisation's rules and procedures to counter your customer's challenging behaviour
- K8 your organisation's limits of what will be tolerated from challenging customers before the transaction or relationship is closed
- K9 the importance of giving your manager or the appropriate colleagues notice of any further approaches from a challenging customer
- K10 when it might be necessary to take action to protect your own safety or that of other customers or colleagues from a challenging customer

CFACSC4

Deliver customer service to challenging customers

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Originating organisation	Skills CFA
Original URN	CFACSC4
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	problem solving; handling problems; difficult customers; dissatisfaction; customer service; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information services; products

Overview

This Standard 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.

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 Standard 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.

CFACSC5

Monitor and solve customer service problems

Performance criteria

Solve immediate customer service problems

You must be able to:

- P1 respond positively to customer service problems following organisational guidelines
- P2 solve customer service problems when you have sufficient authority
- P3 work with others to solve customer service problems
- P4 keep customers informed of the actions being taken
- P5 check with customers that they are comfortable with the actions being taken
- P6 solve problems with service systems and procedures that might affect customers before they become aware of them
- P7 inform managers and colleagues of the steps taken to solve specific problems

Identify repeated customer service problems and options for solving them

You must be able to:

- P8 identify repeated customer service problems
- P9 identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option
- P10 work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of your organisation

Take action to avoid the repetition of customer service problems

You must be able to:

- P11 obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated
- P12 action your agreed solution
- P13 keep your customers informed in a positive and clear manner of steps being taken to solve any service problems
- P14 monitor the changes you have made and adjust them if appropriate

CFACSC5

Monitor and solve customer service problems

Knowledge and understanding

You need to know and understand:

- K1 organisational procedures and systems for dealing with customer service problems
- K2 organisational procedures and systems for identifying repeated customer service problems
- K3 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
- K4 how to negotiate with and reassure customers while their problems are being solved
- K5 the opportunities and potential for monitoring and solving customer service problems presented by remote information collection and sharing such as through social media

CFACSC5

Monitor and solve customer service problems

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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSC5
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	monitor problems; solve problems; customer service problems; customer loyalty; impress; customer service; communication; problem solving; behaviours; work with others; team working; giving information; receiving information services; products

Overview

This Standard 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.

This Standard 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.

CFACSC6

Apply risk assessment to customer service

Performance criteria

Analyse customer service processes for risk

You must be able to:

- P1 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
- P2 identify the financial risks in each stage of the customer service process
- P3 identify the reputational risks in each stage of the customer service process
- P4 identify the health and safety risks in each stage of the customer service process
- P5 identify the risk of delivering sub-standard services or products in each stage of the customer service process
- P6 ensure that your customers are aware of any risks that might impact on them
- P7 develop staff awareness of the risks you have identified

Assess customer service risks and take appropriate actions

You must be able to:

- P8 assess the probabilities of each risk that you have identified
- P9 assess the potential consequence of each risk in terms of finance, reputation and health and safety
- P10 classify each risk as high, medium or low taking into account its probability and potential consequences
- P11 work with colleagues to identify any actions that might be taken to reduce risk
- P12 take appropriate actions to minimise the overall customer service risk profile by adapting procedures

CFACSC6

Apply risk assessment to customer service

Knowledge and understanding

You need to know and understand:

- K1 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)
- K2 risk assessment techniques
- K3 how to evaluate risk using the probability of occurrence and consequences of occurrence
- K4 the nature of potential customer service risks including financial, reputational and health and safety risks
- K5 cost/benefit analysis
- K6 SWOT (Strengths, Weaknesses, Opportunities, Threats) and PESTLE (Political, Economic, Social, Technological, Legal, Environmental) analysis

CFACSC6

Apply risk assessment to customer service

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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSC6
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	risk assessment; risks; health; safety; awareness; identifying; assessing; classifying; prioritising; minimise risks; customer service; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving

Overview

This Standard 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.

This Standard 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.

CFACSC7

Process customer service complaints

Performance criteria

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

You must be able to:

- P1 identify signs that a customer is becoming dissatisfied with the customer service of your organisation
- P2 take action to change the situation so that the query or problem does not result in a complaint
- P3 take actions to change your customer service approach in order to avoid future complaints when a justified complaint has been made

Deal with a complaint effectively

You must be able to:

- P4 ensure that you have a clear understanding of the nature and details of the complaint
- P5 investigate the facts of the complaint in order to establish whether it should be dealt with as a justified complaint or an unjustified complaint
- P6 identify all the possible options for a solution and consider the benefits and drawbacks of each option for your customer and for your organisation
- P7 assess the risks to your organisation of choosing each option
- P8 report the findings of your investigation to your customer and offer your chosen solution
- P9 escalate the complaint by involving more senior members of your organisation or an independent third party if there is sufficient reason to do so
- P10 give feedback to other colleagues involved which will help them avoid future complaints
- P11 keep clear records of the way the complaint has been handled to avoid later misunderstandings

CFACSC7

Process customer service complaints

Knowledge and understanding

You need to know and understand:

- K1 how to monitor the level of complaints and identify those that should provoke a special review of the service offer and service delivery
- K2 why dealing with complaints is an inevitable part of delivering customer service
- K3 organisational procedures for dealing with complaints
- K4 how to negotiate a solution with your customer that is acceptable to that customer and to the organisation
- K5 the regulatory definition of a complaint in your sector and the regulatory requirements of how complaints should be handled and reported
- K6 when to escalate a complaint by involving more senior members of the organisation or an independent third party
- K7 the cost and regulatory implications of admitting liability for an error made by your organisation
- K8 how to spot and interpret signals that your customer may be considering making a complaint
- K9 techniques for handling conflict
- K10 the importance of dealing with a complaint promptly
- K11 why the offer of compensation or replacement service or products may not always be the best options for resolving a complaint
- K12 how the successful handling of a complaint presents an opportunity to impress a customer who has been dissatisfied
- K13 the most effective forms of response when complaints are submitted through different channels such as social media

CFACSC7

Process customer service complaints

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Originating organisation	Skills CFA
Original URN	CFACSC7
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Complaints; problems; procedures; resolution; compensation; customer service; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information services; products

Overview

This Standard 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. This Standard is about the process of handling complaints. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

However effectively customer service is organised, customers make complaints from time to time. In some organisations, it is simply a matter of procedure for all complaints to be handled by particular people. Sometimes, front-line staff or supervisors can deal with these complaints, however, often more senior staff must deal with the complaint. This is either because of the severity of the complaint and its implications for the organisation, or because the customer will accept the solution only if it is dealt with at a senior level. This may require someone with the authority and influence to adapt existing policies and procedures to find an acceptable solution. It is also important for this person to explore patterns and trends in significant complaints and recommend changes to policies and procedures to avoid repetition.

CFACSC8

Handle referred customer complaints

Performance criteria

Investigate referred customer complaints

You must be able to:

- P1 collect all the available information on the nature of the complaint and identify and analyse the organisational implications of the complaint
- P2 take personal responsibility for dealing with the complaint subject to the limits of your authority
- P3 keep your customer informed about what steps are being taken to deal with their complaint
- P4 follow the correct procedures if your customer wishes to escalate the complaint even higher or if the complaint has wider implications for the organisation

Take action to deal with referred customer complaints

You must be able to:

- P5 identify a range of possible solutions that balance customer expectations and your organisation's service offer
- P6 liaise with your customer and colleagues to negotiate an acceptable solution
- P7 agree a solution that adapts current policies and procedures within your own authority and furthers your organisation's aims and objectives
- P8 implement the agreed solution and liaise with your customer to ensure that they are satisfied with the action that has been taken

Identify repeated customer complaints and recommend changes to policies and procedures

You must be able to:

- P9 identify patterns and trends in customer complaints
- P10 analyse trends in customer complaints
- P11 identify solutions acceptable to your customers that fit your organisation's service offer
- P12 identify possible changes to customer service policies and procedures
- P13 consider the benefits and drawbacks of each possible change in terms of balancing customer service and organisational aims
- P14 select an option for change and follow organisational procedures to ensure that your recommendations come to the attention of decision makers

CFACSC8

Handle referred customer complaints

Knowledge and understanding

You need to know and understand:

- K1 the importance of minimising customer complaints and dealing with them effectively and promptly when they occur
- K2 your organisation's complaints procedures and the limits of your authority
- K3 the procedures you must follow if a complaint is likely to be escalated or have wider implications
- K4 the types of complaints that could have wider implications for your organisation
- K5 why it is important to communicate with your customer at all stages of a complaints procedure
- K6 how to devise solutions that balance customer expectations and organisational aims
- K7 why it is important to identify and present to the customer a range of possible options
- K8 why it may be necessary sometimes to adapt organisational policies and procedures to provide a solution acceptable to your customer and how you could justify this
- K9 how to identify trends and patterns in customer complaints and solutions
- K10 how to explore the implications of these patterns and trends for your organisation's policies and procedures
- K11 how to recommend changes to organisational policies and procedures
- K12 the benefits and drawbacks of using different forms of response when complaints have originated through different channels such as social media

CFACSC8

Handle referred customer complaints

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Originating organisation	Skills CFA
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Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Complaints; solutions; patterns; trends; referrals; repetition; customer service; communication; problem solving; behaviours; work with others; giving Information; team working; receiving information services; products

Overview

This Standard 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.

When you deal with your customer regularly, you want to make each occasion a good customer experience. The impression you create and the way the service is delivered affects this in just the same way as when you deal with a customer only once. However, a longer-term relationship with a repeat customer also depends on building up your customer's confidence in the service you offer. Loyalty and a long-term relationship rely on your customer having a realistic view of your organisation's service and being comfortable with it. Your customer will return to your organisation if they feel confident that they will receive excellent service because they have enjoyed good customer experiences with you before.

CFACSD1

Develop customer relationships

Performance criteria

Build your customer's confidence that the service you give will be excellent

You must be able to:

- P1 show that you know and understand your organisation's services or products
- P2 allocate the time you take to deal with your customer following organisational guidelines
- P3 reassure your customer that you are doing everything possible to keep the service promises made by your organisation

Meet the expectations of your customers

You must be able to:

- P4 recognise when there may be a conflict between your customer's expectations and your organisation's service offer
- P5 balance your customer's expectations with your organisation's service offer by offering an alternative or explaining the limits of the service offer
- P6 work effectively with others to resolve any difficulties in meeting your customer's expectations

Develop the long-term relationship between your customer and your organisation

You must be able to:

- P7 give additional help and information to your customer in response to their questions and comments about your organisation's services or products
- P8 discuss expectations with your customer and explain how these compare with your organisation's services or products
- P9 advise others of feedback received from your customer
- P10 identify new ways of helping your customers based on the feedback they have given you
- P11 identify added value that your organisation could offer to long-term customers

CFACSD1

Develop customer relationships

Knowledge and understanding

You need to know and understand:

- K1 the importance of customer retention
- K2 how your own behaviour affects the behaviour of the customer
- K3 how to behave assertively and professionally at all times
- K4 how to defuse potentially stressful situations
- K5 the limitations of your organisation's service offer
- K6 how customer expectations may change as they deal with your organisation
- K7 the cost and resource implications of an extension of the service offer to meet or exceed customer expectations
- K8 the cost implications of bringing in new customers as opposed to retaining existing customers
- K9 who to refer to when considering any variation to your organisation's service offer
- K10 the opportunities offered by different channels of communication such as social media for developing customer relationships

CFACSD1

Develop customer relationships

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Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	customer service; contact centres; improve; develop; communication; problem solving; behaviours; work with others; giving information; teamwork; receiving information services; products

CFACSD10

Develop your own and others' customer service skills



Overview

This Standard 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.

This Standard 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 Standard 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.

CFACSD10

Develop your own and others' customer service skills

Performance criteria

Develop your own customer service skills

You must be able to:

- P1 agree with a manager or mentor the specific customer service skills you need in your customer service role
- P2 agree the actions you need to take to improve your customer service skills
- P3 draw up a personal development plan based on your agreed actions to improve your customer service skills
- P4 carry out your personal development activities and review your progress
- P5 obtain feedback from your manager or mentor about your customer service performance and update your personal development plan

Plan the coaching of others in customer service

You must be able to:

- P6 identify and agree with colleagues specific customer service skills and knowledge they need in their customer service role
- P7 identify opportunities for colleagues to take actions to develop their customer service skills
- P8 plan and organise activities and coaching sessions for colleagues to help them develop their customer service skills

Coach others in customer service

You must be able to:

- P9 coach colleagues to develop specific and agreed customer service skills
- P10 give colleagues the opportunity to practise skills, apply knowledge and gain experience to develop customer service competence
- P11 regularly check the progress of colleagues and modify your coaching as appropriate
- P12 give regular feedback to colleagues about the progress they are making
- P13 explain clearly to colleagues how ongoing support will be provided

CFACSD10

Develop your own and others' customer service skills

Knowledge and understanding

You need to know and understand:

- K1 organisational systems and procedures for developing your own and others' personal performance in customer service
- K2 how your behaviour impacts on others
- K3 how to review effectively your personal strengths and development needs
- K4 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
- K5 how to obtain useful and constructive personal feedback from others
- K6 how to respond positively to personal feedback
- K7 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
- K8 how to give useful and constructive personal feedback to others
- K9 how to help others to respond positively to personal feedback

CFACSD10

Develop your own and others' customer service skills

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CFACSD11

Lead a team to improve customer service



Overview

This Standard 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.

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 Standard 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.

CFACSD11

Lead a team to improve customer service

Performance criteria

Plan and organise the work of a team

You must be able to:

- P1 treat team members with respect at all times
- P2 agree with team members their role in delivering effective customer service
- P3 involve team members in planning and organising their customer service work
- P4 allocate work which takes full account of team members' customer service skills and the objectives of the organisation
- P5 motivate team members to work together to raise their customer service performance

Provide support for team members

You must be able to:

- P6 check that team members understand what they have to do to improve their work with customers and why that is important
- P7 check with team members what support they feel they may need throughout this process
- P8 provide team members with support and direction when they need help
- P9 encourage team members to work together to improve customer service

Review performance of team members

You must be able to:

- P10 provide sensitive feedback to team members about their customer service performance
- P11 encourage team members to discuss their customer service performance
- P12 discuss sensitively with team members action they need to take to continue to improve their customer service performance

CFACSD11

Lead a team to improve customer service

Knowledge and understanding

You need to know and understand:

- K1 the roles and responsibilities of your team members and where they fit in with the overall structure of the organisation
- K2 how team and individual performance can affect the achievement of organisational objectives
- K3 the implications of failure to improve customer service for your team members and your organisation
- K4 how to plan work activities
- K5 how to present plans to others to gain understanding and commitment
- K6 how to facilitate meetings to encourage frank and open discussion
- K7 how to involve and motivate staff to encourage teamwork
- K8 how to recognise and deal sensitively with issues of underperformance

CFACSD11

Lead a team to improve customer service

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Key words	team leading; customer service; contact centres; staffing resources; support, guidance; leading by example; developing; improving; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information; services

CFACSD12

Gather, analyse and interpret customer feedback



Overview

This Standard 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.

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 Standard is all about how you collect that feedback and prepare it for use in the improvement of customer service.

CFACSD12

Gather, analyse and interpret customer feedback

Performance criteria

Plan to gather customer feedback

You must be able to:

- P1 identify the options available for collecting customer service feedback
- P2 evaluate the costs and benefits of each option for collecting customer feedback
- P3 select one or more methods for collecting customer feedback
- P4 plan in detail what information you will collect from customers
- P5 ensure the information you collect has a customer service focus
- P6 plan in detail how you will collect information from customers using your chosen method

Gather customer feedback

You must be able to:

- P7 use your chosen method and detailed plan to collect customer feedback
- P8 monitor the collection of customer feedback to ensure it is falling within your chosen sampling frame
- P9 monitor the collection of customer feedback to ensure it focuses on customer service issues
- P10 record the data you collect in a way that makes analysis and interpretation easy
- P11 respect your customers' rights to confidentiality if they do not want their comments to be identified

Analyse and interpret customer feedback

You must be able to:

- P12 collate data collected from customers in order to identify patterns and trends in customer service
- P13 perform appropriate calculations to summarise patterns and trends in the data
- P14 present your analysis in a form that is easily understood
- P15 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
- P16 make recommendations for changes in your organisation's service offer or customer service processes in response to the views of your customers
- P17 identify ways in which customer feedback can be used to inform customers and develop the customer relationship

CFACSD12

Gather, analyse and interpret customer feedback

Knowledge and understanding

You need to know and understand:

- K1 random sampling techniques and how to evaluate bias in non-random samples
- K2 principles of questionnaire design
- K3 principles of effective interviewing
- K4 how to calculate the cost of a customer survey
- K5 techniques for monitoring data collection
- K6 how to use appropriate software to record and analyse customer feedback
- K7 methods of displaying and presenting data in a way that is easy to understand
- K8 statistical techniques for summarising trends and patterns
- K9 organisational procedures for recommending changes in the service offer or customer service procedures
- K10 the advantages and disadvantages of collecting customer feedback through written questionnaires, by telephone, by interview, using focus groups, through internet, e-mail or social media
- K11 the importance of validating feedback submitted through electronic channels such as social media to ensure that it represents genuine customer opinions

CFACSD12

Gather, analyse and interpret customer feedback

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Suite	Customer Service (2013)
Key words	gather feedback; analyse feedback; interpret feedback; customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information; services; products

Overview

This Standard 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.

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 Standard 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.

CFACSD13

Monitor the quality of customer service transactions

Performance criteria

Prepare to monitor the quality of customer service transactions

You must be able to:

- P1 identify the criteria against which quality of customer service transactions will be monitored
- P2 agree a sampling frame for monitoring customer service transactions
- P3 follow organisational procedures to ensure your monitoring plans are compliant with any need for staff and customers to know they are being observed
- P4 identify ratings and scales against which quality of customer service transactions can be measured
- P5 ensure that you are totally familiar with the customer service procedures for transactions you are monitoring

Monitor the quality of customer service transactions

You must be able to:

- P6 carry out spot checks on or observations of the quality of customer service transactions
- P7 carry out planned and routine checks on or observations of the quality of customer service transactions
- P8 observe or listen to a colleague dealing with a customer service transaction
- P9 record your observations of a colleague's performance against agreed quality criteria
- P10 make judgements about your colleague's quality of service delivery by allocating a performance rating against a defined and agreed rating scale
- P11 analyse and summarise your observations to identify patterns and trends in your colleague's performance

Give feedback on the quality of customer service transactions

You must be able to:

- P12 engage with your colleague in preparation for giving feedback on the quality of their customer service delivery
- P13 provide positive feedback to your colleague by identifying features of customer service that they delivered particularly well
- P14 give feedback to your colleague regarding features of their customer service delivery that would benefit from development
- P15 propose actions for coaching or training of a colleague in areas that would improve their customer service delivery
- P16 maintain records of customer service quality monitoring and action plans for improvements

CFACSD13

Monitor the quality of customer service transactions

Knowledge and understanding

You need to know and understand:

- K1 the criteria against which the quality of customer service delivery is judged in your organisation
- K2 ways to construct a representative sample of customer service transactions in order to monitor quality
- K3 the importance of compliance with guidelines about ensuring customers and colleagues know they are being observed to monitor quality of service
- K4 ways to define ratings and scales against which customer service transactions can be judged
- K5 your organisation's procedures and guidelines for customer service delivery
- K6 ways to record details of customer service transactions you have observed in order to provide feedback
- K7 techniques for analysing and summarising observations in order to identify patterns and trends in customer service delivery
- K8 the importance of providing positive feedback to a colleague prior to identifying areas for improvement
- K9 sources of information about coaching and training options to improve customer service delivery
- K10 the importance of keeping detailed records of coaching and training relating to customer service delivery

CFACSD13

Monitor the quality of customer service transactions

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Suite	Customer Service (2013)
Key words	monitoring quality; customer service transactions; performance ratings; face-to-face; telephone; on-line; measure; patterns and trends; customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others

CFACSD14

Implement quality improvements to customer service



Overview

This Standard 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.

Introducing quality improvements to customer service requires careful management of change. This Standard 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.

CFACSD14

Implement quality improvements to customer service

Performance criteria

Plan the introduction of customer service improvements

You must be able to:

- P1 identify possible customer service improvements and the resources available to implement them
- P2 evaluate factors that may help or hinder the introduction of change
- P3 develop realistic objectives, tasks and schedules for the introduction of improvements and agree them with colleagues
- P4 assess the risks associated with each action to effect change
- P5 plan how you will evaluate the proposed improvements

Manage the implementation of customer service improvements

You must be able to:

- P6 inform the people who will be affected by change, win their support and keep them informed of progress
- P7 implement your plans for improvements dealing effectively with any difficulties
- P8 provide the necessary support to all your colleagues who are involved with changes and improvements
- P9 ensure that planned improvements are implemented on time and within budget

Monitor and evaluate customer service improvements

You must be able to:

- P10 monitor and evaluate the impact that changes are having on the quality of customer service
- P11 identify and recommend any further changes that may be necessary to achieve the planned aims and objectives of improvements
- P12 identify any lessons from the change process and note these for future activities.

CFACSD14

Implement quality improvements to customer service

Knowledge and understanding

You need to know and understand:

- K1 the importance of careful planning when introducing change
- K2 the types of factors that may help or hinder the process of change and how to identify and plan for these
- K3 how to develop plans that contain realistic objectives, tasks and schedules
- K4 the importance of having clear lines of responsibility and accountability
- K5 how to identify and plan for possible contingencies
- K6 the importance of clear communication when changes are taking place
- K7 why it is important to win the support of people who will be affected by change
- K8 how to win over staff who are resistant to change
- K9 the types of support that staff may need when improvements are being implemented and how to provide such support
- K10 why it is important to complete change on time and within budget
- K11 how to monitor and evaluate the impact of change
- K12 why it is important to evaluate change and to note any lessons for future initiatives

CFACSD14

Implement quality improvements to customer service

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Suite	Customer Service (2013)
Key words	implementing quality; improvements; planning; managing change; consultation; communication processes; quality improvement; customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others; teamwork

CFACSD15

Plan and organise the development of customer service staff



Overview

This Standard 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.

Achieving excellent customer service depends on the skills and knowledge of the staff that 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 up 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 Standard is about identifying what development and training is needed for staff, organising its delivery and monitoring its success.

CFACSD15

Plan and organise the development of customer service staff

Performance criteria

Identify customer service staff development and training needs

You must be able to:

- P1 identify where customer service could be improved through staff training and development
- P2 help staff providing customer service to identify their own development and training needs
- P3 help staff to identify how they learn best
- P4 agree the types of staff development and training activities that are needed
- P5 report staff development needs to relevant people in your organisation

Organise customer service development and training

You must be able to:

- P6 agree the aims and objectives of the customer service development and training activities
- P7 agree the type and style of customer service development and training that are appropriate
- P8 agree the detailed design of customer service development and training activities
- P9 organise customer service development and training activities
- P10 monitor the performance of staff involved in the development and training activities to be sure that learning is put into practice
- P11 organise additional help and training for staff where this is needed

CFACSD15

Plan and organise the development of customer service staff

Knowledge and understanding

You need to know and understand:

- K1 the importance of continuously developing staff who provide customer service
- K2 current objectives and targets that relate to customer service in your area of responsibility
- K3 how to identify when development and training could improve customer service performance
- K4 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
- K5 why it is important that you should have an input into the design and delivery of customer service development and training for your staff
- K6 how you can help staff to put into practice what they have learned
- K7 how to assess the impact that development and training has had on customer service performance
- K8 the types of additional support you could provide to staff following development and training

CFACSD15

Plan and organise the development of customer service staff

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CFACSD16

Develop a customer service strategy for a part of an organisation



Overview

This Standard 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.

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 Standard 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.

CFACSD16

Develop a customer service strategy for a part of an organisation

Performance criteria

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

You must be able to:

- P1 identify your organisation's values, aims and objectives
- P2 identify the role of a given part of the organisation in achieving the strategy
- P3 evaluate the implications of the strategy for customer service in this part of the organisation
- P4 confirm the implications of the strategy for customer service with colleagues
- P5 collect information on and analyse customer expectations
- P6 match customer expectations with the customer service implications of the business strategy for a given part of your organisation

Help to identify current and future best practice in customer service

You must be able to:

- P7 identify other organisations which represent models of good practice in customer service
- P8 evaluate the key features of customer service in these organisations and the principles that underpin their approaches
- P9 identify and analyse current research on trends and developments in customer service
- P10 identify and analyse relevant legal and regulatory requirements, codes of practice and ethical considerations
- P11 explore the implications of your research for the part of the organisation you are working in
- P12 discuss the outcomes of your research with colleagues

Identify and recommend the key features of a customer service strategy

You must be able to:

- P13 identify values, aims and objectives that are consistent with your research
- P14 identify contact processes and channels for customer service that are consistent with your values, aims and objectives
- P15 identify how you will evaluate the effectiveness of the strategy
- P16 discuss with colleagues the key features of a customer service strategy
- P17 construct a customer service strategy for the chosen part of the organisation and agree it with colleagues and managers

CFACSD16

Develop a customer service strategy for a part of an organisation

Knowledge and understanding

You need to know and understand:

- K1 the importance of having a customer service strategy for a given part of the organisation
- K2 how to access information on your organisation's overall business strategy and analyse its implications
- K3 sources of information you can use to find out about your customers and their expectations
- K4 the benefits of using information about customers and their expectations available through social media
- K5 the importance of customer loyalty and customer service practices that can help to retain loyalty
- K6 how to identify other organisations which might represent models of best practice in customer service
- K7 sources of research on trends and developments in customer service
- K8 how to develop values, aims and objectives relevant to customer service
- K9 procedures for making recommendations within your organisation.

CFACSD16

Develop a customer service strategy for a part of an organisation

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Overview

This Standard 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.

This Standard is about the competences involved in managing a customer service award programme for individuals or teams within an organisation. 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.

CFACSD17

Manage a customer service award programme

Performance criteria

Plan a customer service award programme

You must be able to:

- P1 identify all the possible options for a customer service award scheme drawing on examples inside and outside of your own organisation
- P2 identify the benefits and drawbacks of each option for a customer service award programme
- P3 choose the option for a customer service award programme that best suits your customer satisfaction and team motivation objectives
- P4 plan the details of your chosen customer service award programme
- P5 identify the benefits and costs of your chosen customer service award programme in relation to customer satisfaction and team motivation
- P6 make a business case for the introduction of a customer service awards programme or for the development of an existing programme

Implement and manage a customer service award programme

You must be able to:

- P7 launch developments in the customer service award programme in a way that informs and motivates customers and team members
- P8 ensure that the criteria for the customer service awards are transparent and are considered fair by team members
- P9 publicise the customer service awards programme to customers in a way that demonstrates organisational commitment to excellent customer service
- P10 organise the judging of individual and team awards in a way that means the results can be justified to the organisation as a whole
- P11 announce the results and present the awards in a manner that suits the culture of your organisation and customer service team
- P12 review and evaluate the effects of the customer service awards programme on customers and team members

CFACSD17

Manage a customer service award programme

Knowledge and understanding

You need to know and understand:

- K1 the principles of motivation and in particular the importance of recognition as a motivator
- K2 how to make use of customer service award programmes as promotional tools to give added value to customer satisfaction
- K3 the benefits and drawbacks of different rewards associated with award programmes
- K4 aspects of organisational culture that may support or detract from the value of a customer service award programme

CFACSD17

Manage a customer service award programme

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Suite	Customer Service (2013)
Key words	Managing; award programme; strategy; motivation; commitment; strategic implications; customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information

CFACSD18

Apply technology or other resources to improve customer service



Overview

This Standard 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.

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 Standard 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.

CFACSD18

Apply technology or other resources to improve customer service

Performance criteria

Identify and specify opportunities for customer service improvement

You must be able to:

- P1 monitor developments in technology and the use of other resources to improve customer service
- P2 review customer service delivery systems with specific reference to use of resources and technology
- P3 identify opportunities and options for improving customer service by applying technology or other resources
- P4 analyse the customer service benefits that could result from options for improvement
- P5 specify the changes in technology or other resources needed to deliver the options

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

You must be able to:

- P6 identify the options for improving customer service with the application of technology or other resources
- P7 establish the costs associated with each option for improving customer service
- P8 list and where possible quantify the benefits from each option for improving customer service
- P9 estimate the affordability of each option to improve customer service
- P10 recommend the most appropriate options for implementation
- P11 identify the probable effects of any recommended changes on your organisation's service offer and customer perceptions
- P12 plan a business case to support your recommendations for improvements through application of technology or other resources

Oversee the implementation of resource changes to improve customer service

You must be able to:

- P13 plan implementation using details of agreed developments to improve customer service
- P14 brief colleagues about the implementation of customer service improvements and the expected benefits
- P15 monitor implementation of customer service improvements and the expected benefits
- P16 review implementation of customer service improvements with colleagues
- P17 make appropriate adjustments to implementation of customer service improvements as a result of review

CFACSD18

Apply technology or other resources to improve customer service

Knowledge and understanding

You need to know and understand:

- K1 current trends in information and communication technology (ICT) that imply changes to the channels and social media platforms used by customers
- K2 features and functionality of available technology that may contribute to improvements in customer service
- K3 how the application of additional resources other than technology can be used to improve customer service
- K4 methods for the systematic review of customer service systems
- K5 techniques to analyse the costs and benefits of options for improving customer service
- K6 methods for presenting a business case for applying technology or other resources to make improvements in customer service
- K7 briefing techniques for introducing colleagues to changes
- K8 ways to review and adjust customer service delivery after the implementation of changes

CFACSD18

Apply technology or other resources to improve customer service

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CFACSD19

Review and re-engineer customer service processes



Overview

This Standard 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.

From time to time, a customer process must be subject to review. Most of all, this is because both customer service expectations and the external 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 Standard 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 Standard is for you if you are responsible for reviewing customer service processes. Do not use this Standard if you do not hold that responsibility and do not have the support of those with authority to make changes.

CFACSD19

Review and re-engineer customer service processes

Performance criteria

Scope the customer service processes to be reviewed

You must be able to:

- P1 define the boundaries of a customer service process
- P2 agree with the appropriate people the boundaries of the customer service process to be reviewed
- P3 set parameters for the types of change that might be made during the re-engineering
- P4 communicate with everybody involved regarding the aims of the review

Analyse the customer service process and identify improvement opportunities

You must be able to:

- P5 identify all the key steps in the customer service process
- P6 analyse each step in the customer service process in fine detail
- P7 assess each step in the customer service process with reference to customer satisfaction, costs and compliance with relevant regulation
- P8 raise questions about each step in the current process to establish where there is scope for development and improvement
- P9 explore all the questions raised with those involved in the process and their managers
- P10 identify options for re-engineering improvements that deserve further investigation

Evaluate improvement options and re-engineer service processes

You must be able to:

- P11 evaluate each option for re-engineering improvements that deserve further investigation
- P12 make and agree recommendations regarding each option that has been evaluated for re-engineering the customer service process
- P13 plan the implementation of agreed recommendations for re-engineering the customer service process
- P14 implement re-engineering of the customer service process
- P15 monitor the results of implementing re-engineering of the customer service process

CFACSD19

Review and re-engineer customer service processes

Knowledge and understanding

You need to know and understand:

- K1 ways to establish boundaries around a customer service process to be re-engineered
- K2 who needs to be involved in the re-engineering process to ensure that the recommendations can be seen through
- K3 the importance of communicating with those involved in service delivery when re-engineering the process
- K4 ways to analyse and assess the effectiveness of separate steps in the customer service process
- K5 the importance of identifying the right questions to challenge existing customer service processes appropriately
- K6 techniques for implementing changes in customer service processes
- K7 the importance of monitoring the effects of customer service process changes

CFACSD19

Review and re-engineer customer service processes

Developed by	Skills CFA
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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSD19
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Review; re-engineer; customer service processes; customer expectations; environmental change; cost awareness; compliance regulation; management; customer service; contact centres; developing; improving; communication; problem solving; behaviours

Overview

This Standard 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.

Organisations change the way they deliver service to their customers because customer expectations rise and because other organisations improve the services they offer. Often the most important ideas about how to improve customer service come from people dealing directly with customers. Your job involves delivering customer service. If your organisation has decided to make changes, it is your job to support them and to present them positively to your customers. Also, by listening to customer comments you may have your own ideas about how the service you deliver could be improved. This Standard is about how you provide support for changes that your organisation has introduced. In addition, it covers how you present your own ideas for improvements to someone in your organisation who can authorise trying out the change.

CFACSD2

Support customer service improvements

Performance criteria

Use feedback to identify potential customer service improvements

You must be able to:

- P1 gather informal feedback from your customers
- P2 use your organisation's procedures to collect feedback from your customers
- P3 use the information from your customers to develop a better understanding of their customer service experience
- P4 identify ways the service you give could be improved based on information you have gathered
- P5 share your ideas for improving customer service with colleagues

Implement changes in customer service

You must be able to:

- P6 identify a possible change that could be made to improve customer service
- P7 present your idea for improving customer service to a colleague with the appropriate authority to approve the change
- P8 carry out changes to customer service procedures based on your own idea or proposed by your organisation
- P9 keep your customers informed of changes to customer service
- P10 give customers a positive impression of changes that have been made
- P11 work positively with others to support customer service changes

Assist with the evaluation of changes in customer service

You must be able to:

- P12 discuss with others how changes to customer service are working
- P13 work with others to identify any negative effects of changes and how these can be avoided

CFACSD2

Support customer service improvements

Knowledge and understanding

You need to know and understand:

- K1 how customer experience is influenced by the way service is delivered
- K2 how customer feedback is obtained
- K3 how to work with others to identify and support change in the way service is delivered
- K4 why it is important to give a positive impression to your customer about the changes made by your organisation even if you disagree with them

CFACSD2

Support customer service improvements

Developed by	Skills CFA
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Version number	2
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Date approved	January 2013
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Validity	Current
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Status	Original
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Originating organisation	Skills CFA
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Original URN	CFACSD2
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Relevant occupations	Customer Service Occupations
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Suite	Customer Service (2013)
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Key words	customer service; contact centres; improvements; develop; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information services; products
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Overview

This Standard 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.

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 Standard is about those monitoring and management processes. This Standard 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.

CFACSD20

Manage customer service performance

Performance criteria

Monitor performance in customer service operations

You must be able to:

- P1 collect regular statistics on customer service operations performance
- P2 interpret broad patterns of customer service operations statistics
- P3 investigate questions raised by interpretation and analysis of performance
- P4 interpret statistics regarding customer service performance in specific product and service areas
- P5 match customer service performance statistics to benchmarks, targets, standards or agreed tolerances
- P6 use customer service performance statistics to identify trends
- P7 compare customer service performance statistics with broader quality monitoring results
- P8 review resource provision to identify any resource changes needed to improve customer service performance management

Take management actions to improve performance in customer service operations

You must be able to:

- P9 identify management actions to maintain and improve on customer service performance
- P10 summarise monitoring evidence to support the case for management actions to improve performance
- P11 brief team members on changes they must make to improve customer service performance
- P12 organise resource changes needed to improve customer service performance
- P13 organise suitable coaching or training to improve customer service performance where development needs have been identified
- P14 adjust customer service performance targets which have ceased to be both challenging and achievable

CFACSD20

Manage customer service performance

Knowledge and understanding

You need to know and understand:

- K1 methods for collecting statistics on customer service operations performance
- K2 techniques for interpreting customer service performance statistics
- K3 the importance of setting targets that are SMART (Specific, Measurable, Achievable, Realistic, Time-bound)
- K4 sources of benchmarks and standards for customer service performance
- K5 techniques for identifying trends and patterns in customer service performance
- K6 options for management actions that will improve customer service performance
- K7 methods of coaching and training to improve customer service performance

CFACSD20

Manage customer service performance

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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSD20
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Management; customer service performance; metrics; ratings; measuring; performance measures; benchmarking; targets; identify trends; identify patterns; monitor outcomes; customer service; contact centres; developing; Improving; communication; problem solving

CFACSD21

Analyse and report on the content of customer service feedback posted on social media platforms



Overview

This Standard 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.

For many organisations, important customer feedback can be found on social media platforms. Customers and influencers exchange opinions about the service they receive from organisations and those opinions may have a significant effect on those organisations' reputations. Sometimes communication through social media is an integral part of an organisation dealing with its customers. However, it also pays to monitor and review social media content more broadly in order to see patterns. This in turn may lead to suggestions for improvements to customer service and changes in the way an organisation deals with its customers. This Standard is about taking a structured approach to the process of analysing and reporting on feedback obtained through the social media. You should choose this Standard if one part of your job role involves monitoring of that process.

CFACSD21

Analyse and report on the content of customer service feedback posted on social media platforms

Performance criteria

Collect and collate customer service feedback on social media platforms

You must be able to:

- P1 search social media platforms for customer feedback
- P2 identify customer service feedback posted as social media by customers
- P3 select one or more methods for collecting customer feedback from social media platforms
- P4 record the data you collect in a way that makes analysis and interpretation easy
- P5 respect your customers' rights to confidentiality if they do not want their comments to be identified

Analyse customer service feedback gathered from social media platforms

You must be able to:

- P6 confirm that customer service feedback posted on social media is accurate and valid
- P7 classify and collate customer service feedback placed on social media platforms by customers
- P8 assemble and collate customer service feedback on social media given in response to specific requests
- P9 identify patterns and trends in customer service revealed by feedback from social media
- P10 calculate and summarise patterns and trends in feedback from customers using social media platforms
- P11 present your analysis in a form that is easily understood
- P12 link your analysis with your organisation's service offer and customer service processes
- P13 make recommendations about actions that may be appropriate in response to customer service feedback
- P14 respond to customers service feedback through social media platforms where this is appropriate

CFACSD21

Analyse and report on the content of customer service feedback posted on social media platforms

Knowledge and understanding

You need to know and understand:

- K1 random sampling techniques and how to evaluate bias in non-random sampling
- K2 principles of questionnaire design
- K3 how to search social media platforms for customer service feedback posted by customers
- K4 how to ensure that customer service feedback posted on social media platforms is accurate and valid
- K5 how to calculate the cost of a customer survey
- K6 how to use appropriate software to record and analyse customer feedback
- K7 methods of displaying and presenting data in a way that is easy to understand
- K8 statistical techniques for summarising trends and patterns
- K9 organisational procedures for recommending changes in your service offer or customer service procedures

CFACSD21

Analyse and report on the content of customer service feedback posted on social media platforms

Developed by	Skills CFA
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Validity	Current
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Status	Original
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Originating organisation	Skills CFA
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Original URN	CFACSD21
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Relevant occupations	Customer Service Occupations
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Suite	Customer Service (2013)
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Key words	development and improvement; social media platforms; customer feedback
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CFACSD22

Develop a customer service network through social media platforms



Overview

This Standard 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.

Social media marketing represents a defined route for tackling all marketing activities using social media platforms. Especially where social media marketing is used, an organisation is likely to choose on-going use of social media to deliver customer service both proactively and reactively. This involves establishing and maintaining an appropriate presence on commonly used social media platforms. It also involves dealing with customers through those platforms so that a social media community is linked directly with each other and with the organisation. This Standard is all about the customer service actions needed to maintain and develop a customer network using social media platforms as important channels of communication. You should choose this Standard if your customer service role includes a full and active involvement with social media platform uses for customer service.

CFACSD22

Develop a customer service network through social media platforms

Performance criteria

Identify and develop customer service processes that can be enhanced using social media

You must be able to:

- P1 analyse customer service processes that are essential to your organisation's service offer, services or products
- P2 identify social media platforms which are most likely to be used by your organisation's customers
- P3 research the ways in which your organisation and others currently use social media platforms for customer service
- P4 draw up a profile of how your customers and potential customers use social media platforms
- P5 identify social media communities that are relevant to your organisation's customer service processes
- P6 draw up profiles of the social media communities that are relevant to your organisation's customer service processes
- P7 identify and define improvements that could be made to your organisation's use of social media for customer service
- P8 check your proposed improvements comply with regulation relating to the use of social media

Manage on-going delivery of customer service using social media

You must be able to:

- P9 plan enhanced use of social media to deliver customer service using data gathered when reviewing existing social media uses
- P10 work with colleagues to allocate responsibilities for making improvements to social media use for customer service
- P11 contribute to the development of procedures for providing customer service to customers and social media communities
- P12 contribute to the implementation of improvements in customer service using social media
- P13 monitor the effects of improvements to customer service using social media
- P14 review use of social media for delivery of customer service using data collected through monitoring to identify further improvements

CFACSD22

Develop a customer service network through social media platforms

Knowledge and understanding

You need to know and understand:

- K1 how to analyse customer service processes
- K2 your organisation's service offer, services or products
- K3 the mainstream and niche social media platforms used by customers
- K4 how organisations use social media platforms for customer service
- K5 how to profile customers who use particular social media platforms
- K6 the importance of making an impact on social media communications
- K7 how social media communications work
- K8 regulations relating to the use of social media
- K9 ways to develop improvements in the use of social media for customer service delivery
- K10 the importance of teamwork when seeking to devise and implement customer service improvements using social media
- K11 how to devise and present procedures for providing customer service using social media
- K12 how to select the data required for monitoring and observing improvements to customer service using social media
- K13 how to monitor the effects of improvements to customer service when observing social media data
- K14 metrics that may be used to monitor improvements to customer service using social media

CFACSD22

Develop a customer service network through social media platforms

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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSD22
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	social media marketing; development and improvement; social media platforms; customer service

CFACSD3

Develop personal performance through delivering customer service



Overview

This Standard 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.

Delivering customer service presents many opportunities for learning and for developing personal skills. This Standard is about how you can develop your personal skills at the same time as improving your customer service performance. You must plan together with a manager or mentor and then carry out activities which help you learn and develop in your customer service role. Customer service improvements rely on continuous improvement and this includes improving your own skills.

CFACSD3

Develop personal performance through delivering customer service

Performance criteria

Review performance in your customer service role

You must be able to:

- P1 work with an appropriate person to establish what you need to know, understand and be able to do, in order to work effectively in your customer service role
- P2 identify and review situations from your own positive and negative experiences as a customer
- P3 carry out a self-assessment of your performance in your customer service role and identify your strengths, weaknesses and development needs

Prepare a personal development plan and keep it up to date

You must be able to:

- P4 agree your strengths, weaknesses and development needs with an appropriate person
- P5 work with an appropriate person to draw up your own development objectives to improve your performance in your customer service role
- P6 develop a customer service personal development plan
- P7 regularly review your progress towards your objectives with an appropriate person

Undertake development activities and obtain feedback on your customer service performance

You must be able to:

- P8 complete development activities identified in your customer service personal development plan
- P9 use your day to day experiences with your customers and your own experiences as a customer to develop your customer service performance
- P10 obtain feedback from an appropriate person about your customer service performance
- P11 review and update your customer service personal development plan

CFACSD3

Develop personal performance through delivering customer service

Knowledge and understanding

You need to know and understand:

- K1 your organisation's systems and procedures for developing personal performance in customer service
- K2 how your behaviour has an effect on the behaviour of others
- K3 how effective learning depends on a process of planning, doing and reviewing
- K4 how to review effectively your personal strengths and development needs
- K5 how to put together a personal development plan that will build on your strengths and overcome your weaknesses in areas that are important to customer service
- K6 how to access sources of information and support for your learning
- K7 how to obtain useful and constructive personal feedback from others
- K8 how to respond positively to personal feedback

CFACSD3

Develop personal performance through delivering customer service

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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSD3
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	personal performance; developing skills; improving performance; continuous improvement; improving skills; delivery; customer service; contact centres; improve; develop; communication; problem solving; behaviours; work with others; teamwork; giving information

Overview

This Standard 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.

Many organisations develop their customer service by directing customers towards on-line services. Customer service delivered on-line leaves a customer isolated and reliant on screen routes and instructions. A customer may seek help face to face or by telephone. That help will involve you in understanding what your customer is trying to achieve, how the system allows for that and what point they have reached in terms of finding the right route. Difficulties can arise if the system fails or if your customer is unable to discover how it can deliver what they want. This Standard is for you if one part of your job involves helping customers to find their way through on-line systems.

CFACSD4

Support customers using on-line customer services

Performance criteria

Establish the type and level of support your customer needs to achieve on-line customer service

You must be able to:

- P1 ensure that you are completely familiar and up-to-date and with the on-line services that your customers use
- P2 listen carefully to what your customer is trying to achieve
- P3 listen carefully to what your customer is having difficulties with
- P4 question your customer to discover their degree of familiarity with the system
- P5 offer your customer the option of trying the on-line approach once more
- P6 agree with your customer the exact nature of their problem and steps that may be taken to overcome it

Support on-line customer service in conversation with your customer

You must be able to:

- P7 explore the on-line customer system in order to develop your own knowledge and skills in its use
- P8 step through the screen sequence with your customer whilst allowing them to operate the system for themselves
- P9 address your customer in an understanding and supportive manner P10 explain to your customer why certain steps are required in the process P11 offer the options to your customer of taking them through the process or completing the transaction yourself
- P12 promote access to additional services or products when supporting customers on-line

CFACSD4

Support customers using on-line customer services

Knowledge and understanding

You need to know and understand:

- K1 how your organisation's system for on-line service delivery works
- K2 the importance of close active listening to discover what your customer is trying to achieve
- K3 ways to communicate clearly with customers who have different levels of skills and understanding of the on-line system
- K4 why it is generally preferable for your customer to complete a transaction for themselves
- K5 the importance of building customer confidence in using the on-line system by supporting and encouraging
- K6 the benefits and drawbacks of talking a customer through use of the system or completing the transaction yourself
- K7 additional services or products that may be promoted to on-line customers

CFACSD4

Support customers using on-line customer services

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Originating organisation	Skills CFA
Original URN	CFACSD4
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	face to face; telephone; system failure; development; improvement; on-line; customer service; contact centres; improve; develop; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information

CFACSD5

Buddy a colleague to develop their customer service skills



Overview

This Standard 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.

In customer service roles it is often useful to have a 'buddy' relationship with somebody who has more experience of the same customer service situation. If you are asked to buddy a colleague who is learning customer service aspects of their job, you need to approach that responsibility in an organised way. This Standard is about how to be a good buddy by working alongside your colleague and providing them with constructive feedback and support. You do not need to be more senior than your colleague or their supervisor to act as a customer service buddy.

CFACSD5

Buddy a colleague to develop their customer service skills

Performance criteria

Plan and prepare to buddy a colleague

You must be able to:

- P1 agree with your colleague aspects of their work which may benefit most from your buddying support
- P2 your understanding of your colleague's job tasks and responsibilities using reliable sources
- P3 clarify the customer service image and impression your colleague should present in their job
- P4 arrange times when it will be most helpful to work alongside your colleague
- P5 plan details of a buddy session to support your colleague on the job

Support your buddy colleague on the job

You must be able to:

- P6 agree with your colleague where you will be placed near them when buddying them on the job
- P7 ensure your presence when your buddy is dealing with customers does not detract from effective customer service
- P8 carry out customer service tasks in the presence of your buddy colleague to set an example they can follow
- P9 observe your colleague closely to identify what they do well and areas in which they could improve
- P10 discuss each customer transaction briefly when there is time available between dealing with customers to identify approaches that work well and areas for improvement
- P11 praise your colleague on aspects of their work which they have carried out well
- P12 explain to your colleague ways in which they can improve their customer service performance
- P13 make notes on your colleague's strengths and areas for development that you can discuss with them

Provide buddy support off the job

You must be able to:

- P14 arrange suitable times to meet with your buddy colleague when they are not directly engaged with customers
- P15 identify areas of general interest that help to establish rapport with your buddy colleague
- P16 use notes made when observing your colleague to discuss positive and negative aspects of their performance
- P17 agree actions your buddy colleague can take to improve their customer service performance
- P18 offer hints and tips on effective customer service actions to your buddy colleague drawn from your own experience

CFACSD5

Buddy a colleague to develop their customer service skills

Knowledge and understanding

You need to know and understand:

- K1 the tasks in your buddy colleague's job
- K2 areas of the job that benefit most from buddying support
- K3 the customer service image and impression that should be presented in your buddy colleague's job
- K4 the best times at which to work alongside your buddy colleague
- K5 ways to work alongside your buddy colleague without intruding on the customer relationship
- K6 techniques for giving positive feedback and constructive criticism to your buddy colleague
- K7 the importance of establishing an effective rapport with your buddy colleague
- K8 options for actions your buddy colleague can take to improve their customer service performance

CFACSD5

Buddy a colleague to develop their customer service skills

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Originating organisation	Skills CFA
Original URN	CFACSD5
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Buddying; colleagues; develop skills; relationships; learning; working together; constructive feedback; customer service; contact centres; improve; develop; communication; problem solving; behaviours; work with others; teamwork; giving information

CFACSD6

Develop your own customer service skills through individual learning



Overview

This Standard 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.

Much of the responsibility for developing customer service knowledge and skills rests on you as an individual. There are numerous sources of information that can be used but which need to be located and linked with your customer service role. When located, the learning materials must be used to good effect in an organised manner. This Standard is about locating and using materials to help you learn in the course of your work. It is the right Standard for you if you need to take responsibility for your own self-development in relation to customer service skills.

CFACSD6

Develop your own customer service skills through individual learning

Performance criteria

Find ways to learn more about customer service and your job

You must be able to:

- P1 identify different sources of information and support that will help you to develop your customer service knowledge and skills
- P2 agree with your line manager, your mentor or others doing a similar job the best sources to use for self-development of your customer service knowledge and skills
- P3 take action to remind yourself to regularly access sources of information and support
- P4 search for additional sources of information to support your customer service learning
- P5 store materials that support self-study for future use
- P6 plan time to study the self-study materials you have collected
- P7 draw up a list of actions that together form a self-development plan

Use sources of self-development to extend your customer service skills and knowledge

You must be able to:

- P8 access organisational update information to extend your knowledge of services or products
- P9 access organisational information to learn more about the way your role contributes to customer service
- P10 monitor publications to identify ideas and new developments in customer service which you could apply in your work
- P11 study collected information to develop your own customer service knowledge and skills
- P12 take action resulting from your learning to change the way you deal with customers
- P13 share your plans for action with your line manager, your mentor or others doing a similar job to seek their ideas for further options
- P14 record actions you take to learn more about customer service and identify those which have the most positive effects

CFACSD6

Develop your own customer service skills through individual learning

Knowledge and understanding

You need to know and understand:

- K1 ways to locate information updating you on services or products in your organisation
- K2 sources of information about customer service knowledge and skills that will help you to develop
- K3 ways to store information that you use to develop your customer service skills
- K4 the importance of focus when self-studying to improve your customer service knowledge and skills
- K5 ways to convert information or ideas you have found through self-study into practical customer service actions
- K6 the value of discussing your learning with line manager, your mentor or others doing a similar job
- K7 methods of recording actions to improve your customer service skills which have had positive effects

CFACSD6

Develop your own customer service skills through individual learning

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Originating organisation	Skills CFA
Original URN	CFACSD6
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	CPD; learning materials; locating; self-development; self-study; developing skills; customer service; contact centres; improve; develop; communication; problem solving; behaviours; work with others; giving information; teamwork; receiving

Overview

This Standard 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.

Many organisations develop their customer service by directing customers towards self-service equipment which is operated by the customer alone. Regular customers become familiar with how that equipment operates and some will feel uncomfortable about being offered further help. Others may be learning about the use of the equipment for the first time or may be experiencing particular problems. Sometimes equipment fails and authorised intervention will be needed to clear it. Whichever is the case, you must be able to recognise what help and intervention is needed and to provide that in a way that pleases your customer and builds their confidence in the use of the equipment. This Standard is right for you if any part of your job involves helping and encouraging customers to operate self-service equipment in order to improve their customer experience.

CFACSD7

Support customers using self-service technology

Performance criteria

Identify the type of help needed by a customer using self-service technology

You must be able to:

- P1 prepare a standard demonstration of using the self-service equipment
- P2 prepare to answer frequently asked questions about the operation of the self-service equipment
- P3 identify signs of when a customer is having difficulty with the self-service equipment
- P4 choose an appropriate style and level of intervention to help a customer who is having trouble using the self-service equipment

Assist a customer using self-service technology

You must be able to:

- P5 maintain a professional, polite and approachable manner while you observe customers using self-service technology
- P6 demonstrate use of the self-service equipment to a customer
- P7 respond to a request for help from a customer using self-service equipment
- P8 make use of staff override options to clear self-service equipment for use by customers
- P9 talk a customer through use of the self-service equipment whilst allowing them to operate it
- P10 invite a customer to repeat the operation of the self-service equipment if that helps them to learn
- P11 make positive and encouraging comments to a customer who is learning to use the self-service equipment
- P12 explain to your customer why certain actions and steps are needed to operate self-service equipment
- P13 troubleshoot problems with self-service equipment and report errors and issues to appropriate people

CFACSD7

Support customers using self-service technology

Knowledge and understanding

You need to know and understand:

- K1 reasons why your organisation chooses to offer customers self-service equipment
- K2 all aspects of normal operation of the customer self-service equipment
- K3 frequently asked questions about operation of the self-service equipment and effective answers to those questions
- K4 techniques for giving an effective demonstration of self-service equipment
- K5 signals and signs that a customer needs help with self-service equipment
- K6 organisational procedures for using staff intervention to clear self-service equipment
- K7 the importance of building customer confidence in using self-service equipment
- K8 organisational procedures for dealing with self-service equipment problems

CFACSD7

Support customers using self-service technology

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Original URN	CFACSD7
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	self-service equipment; self-study; technology; interventions; operators; customer experience; customer service; contact centres; improve; develop; communication; problem solving; behaviours; work with others; teamwork; giving information

Overview

This Standard 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.

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 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 Standard is about how you develop a relationship with others to improve your customer service performance.

CFACSD8

Work with others to improve customer service

Performance criteria

Improve customer service by working with others

You must be able to:

- P1 contribute constructive ideas for improving customer service
- P2 identify what you have to do to improve customer service and confirm this with others
- P3 agree with others what they have to do to improve customer service
- P4 co-operate with others to improve customer service
- P5 keep your commitments made to others
- P6 make others aware of anything that may affect plans to improve customer service

Monitor your own performance when improving customer service

You must be able to:

- P7 discuss with others how what you do affects customer service performance
- P8 identify how the way you work with others contributes towards improving customer service

Monitor team performance when improving customer service

You must be able to:

- P9 discuss with others how teamwork affects customer service performance
- P10 work with others to collect information on the team's customer service performance
- P11 identify with others how customer service teamwork could be improved
- P12 take action with others to improve customer service performance

CFACSD8

Work with others to improve customer service

Knowledge and understanding

You need to know and understand:

- K1 who else is involved either directly or indirectly in the delivery of customer service
- K2 the roles and responsibilities of others in your organisation
- K3 the roles of others outside your organisation who have an impact on your services or products
- K4 what the goals or targets of your organisation are in relation to customer service and how these are set
- K5 how your organisation identifies improvements in customer service

CFACSD8

Work with others to improve customer service

Developed by	Skills CFA
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Version number	2
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Date approved	January 2013
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Indicative review date	January 2016
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Validity	Current
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Status	Original
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Originating organisation	Skills CFA
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Original URN	CFACSD8
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Relevant occupations	Customer Service Occupations
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Suite	Customer Service (2013)
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Key words	customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information; services; products
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Overview

This Standard 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.

This Standard 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 Standard covers the competence of organising and seeing through change that is sustainable and is in the spirit of continuous improvement in customer service.

CFACSD9

Promote continuous improvement

Performance criteria

Plan improvements in customer service based on customer feedback

You must be able to:

- P1 gather feedback from customers that will help to identify opportunities for customer service improvement
- P2 analyse and interpret feedback to identify opportunities for customer service improvements and propose changes
- P3 discuss with others the potential effects of any proposed changes for your customers and your organisation
- P4 negotiate changes in customer service systems and improvements with somebody with sufficient authority to approve trial or full implementation of the change

Implement changes in customer service

You must be able to:

- P5 organise the implementation of authorised changes
- P6 implement the changes following organisational guidelines
- P7 inform people inside and outside your organisation who need to know of the changes being made and the reasons for them
- P8 monitor early reactions to changes and make appropriate fine-tuning adjustments

Review changes to promote continuous improvement

You must be able to:

- P9 collect and record feedback on the effects of changes
- P10 analyse and interpret feedback and share your findings on the effects of changes with others
- P11 summarise the advantages and disadvantages of the changes
- P12 use your analysis and interpretation of changes to identify opportunities for further improvement
- P13 present these opportunities to somebody with sufficient authority to make them happen

CFACSD9

Promote continuous improvement

Knowledge and understanding

You need to know and understand:

- K1 how service improvements in your area affect the balance between overall customer satisfaction, the costs of providing service and regulatory requirements
- K2 how customer experience is influenced by the way service is delivered
- K3 how to collect, analyse and present customer feedback
- K4 how to make a business case to others to bring about change in the services or products you offer
- K5 how developments in communication channels such as social media present opportunities for customer service improvements

CFACSD9

Promote continuous improvement

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Date approved	January 2013
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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSD9
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	identifying changes; consequences; organising; continuous improvement; customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information; service

Overview

This Standard is part of the Customer Service Theme of Customer Service Foundations. This 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.

You need to be able to communicate with customers and colleagues using language and concepts that they can understand. This Standard is about the language and basic principles that are at the heart of customer service and the skills you need to communicate effectively with customers and colleagues. It also covers how you fit into the customer service picture in your organisation and the contribution of your job to good customer service. You need to be able to describe and explain the services or products that your organisation offers and how it delivers customer service. This means that you need to use the right language to describe customer service and describe why an organisation needs to balance customer needs with what the organisation is willing and able to provide. Using that language, the Standard will help you to understand how you and your job fit in. Everybody involved in customer service needs to know the customer service content of their job.

CFACSF1

Communicate in a customer service environment

Performance criteria

Identify customers and their characteristics and expectations

You must be able to:

- P1 recognise typical customers and their expectations
- P2 discuss customer expectations with colleagues using recognised customer service language
- P3 follow procedures through which you and your colleagues deliver effective customer service

Identify your organisation's services or products

You must be able to:

- P4 outline your organisation's services or products to customers
- P5 list the information you need to deliver effective customer service and where that information can be found
- P6 discuss with colleagues the part you play in delivering your organisation's service offer

CFACSF1

Communicate in a customer service environment

Knowledge and understanding

You need to know and understand:

- K1 who your customers are and the differences between an internal customer and an external customer
- K2 your organisation's services or products and how to find information about them
- K3 the connection between customer expectations and customer satisfaction in customer service
- K4 why good customer service is important to any organisation
- K5 why organisational procedures and teamwork are important to good customer service
- K6 the service offer of your organisation and the part you play in delivering it
- K7 who's who and who does what in delivering customer service in your organisation
- K8 the main characteristics of typical customers that you deal with, what impresses them and what might upset or annoy them
- K9 the kinds of information you need to give good service to customers
- K10 typical customer service problems in your work and who should be told about them
- K11 how the way you behave affects your customer's service experience

CFACSF1

Communicate in a customer service environment

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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSF1
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	customer service; language; communication; work with colleagues; follow procedures; give information; types of customer; company procedures; services and products; answer questions; service offer; internal customer; external customer; teamwork; problem solving

Overview

This standard is part of the Customer Service Theme of Customer Service Foundations. This 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.

There are rules set by organisations about what you can and cannot do for customers. Some of those rules are the result of general responsibilities set by legislation and apply to everybody. Other rules are specific to an industry so are followed by your organisation because of the business you are in. Some rules are set by your organisation alone because of the particular way it wants its customer service to be delivered. This standard requires you to show that you know and understand all the rules that apply to customer service delivered by your organisation and how they apply to you and your job.

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CFACSF2

Deliver customer service within the rules

Performance criteria

Follow your organisation's customer service practices and procedures

You must be able to:

- P1 follow organisational practices and procedures that relate to your customer service work
- P2 recognise the limits of what you are allowed to do when delivering customer service
- P3 refer to somebody in authority when you need to
- P4 work in a way that protects the security of customers and their property
- P5 work in a way that protects the security of data relating to customers

Follow legislation and external regulation that relate to customer service

You must be able to:

- P6 work in a way that is safe for your customers and your colleagues
- P7 treat customers equally
- P8 respect confidentiality relating to customers and the organisation
- P9 work in a way that shows you are aware of the areas of your job that are covered by legislation and the things you must not do
- P10 work in a way that shows you are aware of the main external regulations that apply to your job and the things you must not

CFACSF2

Deliver customer service within the rules

Knowledge and understanding

You need to know and understand:

- K1 organisational practices and procedures that relate to your customer service work
- K2 the limits of what you are allowed to do when delivering customer service
- K3 when and how you should refer to somebody in authority about the rules for delivering customer service
- K4 how you protect the security of customers and their property
- K5 how you protect the security of information about customers
- K6 your health and safety responsibilities as they relate to your customer service work
- K7 your responsibilities to deliver customer service whilst treating customers equally
- K8 why it is important to respect customer and organisation confidentiality
- K9 the main things you must do and not do in your job under legislation that affects your customer service work
- K10 the main things that you must do and not do in your job under external regulations that affect your customer service work

CFACSF2

Deliver customer service within the rules

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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSF2
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Industry; rules; legislation; customer service; organisational practices; organisation procedures; security; delivery; health; safety; external regulations; equality; confidentiality

Overview

This Standard 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.

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 Standard 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 Standard influence all aspects of making customer service work and enable you to place professional customer service 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 deeper and broader understanding of customer service language and principles.

CFACSF3

Show understanding of customer service principles

Performance criteria

Use accepted customer service language

You must be able to:

- P1 communicate to customers your organisation's service offer, how it balances organisational and customer needs and how it meets customer expectations
- P2 compare the service offers of commercial, public sector and third sector organisations and how they each meet customer expectations
- P3 discuss with colleagues steps that team members can take to deal with different customers and different customer service situations

Apply customer service principles in your customer service role

You must be able to:

- P4 follow the key policies and procedures in your organisation for the delivery of services or products
- P5 show an awareness of how your organisation's service approach and service offer fit within your own industry and differ from those of other industries
- P6 show an awareness of how your organisation's service approach and service offer differ from your organisation's competitors
- P7 discuss with colleagues how your organisation's ethical and value base fits with organisational needs and customer expectations

CFACSF3

Show understanding of customer service principles

Knowledge and understanding

You need to know and understand:

- K1 how your organisation's service offer manages customer expectations within financial and other resource limitations
- K2 how customers form their expectations of services or products
- K3 how customer service can contribute to best value in a public sector or third sector organisation
- K4 how customer service can provide a competitive advantage for a commercial organisation
- K5 how you deal with different customer behaviours and personalities to achieve customer satisfaction
- K6 the importance of effective communication and teamwork for the delivery of excellent customer service
- K7 the importance of continuous improvement within customer service
- K8 the key policies and procedures in your organisation for the delivery of services or products and why it is important to follow them
- K9 how your industry's approach to customer service differs from the approach of one other industry
- K10 the service offer of competitors of your organisation or any organisations offering similar services or products
- K11 the features and benefits of your organisation's services or products that influence customer service delivery and customer satisfaction
- K12 how your organisation balances its needs and goals with customer expectations and needs
- K13 the ethical and value base of your organisation's approach to customer service

CFACSF3

Show understanding of customer service principles

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Version number	2
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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSF3
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	customer service; customer care; contact centres; communication; problem solving; behaviours; customer service principles; customer service professional; work with colleagues; customer service language; service offer; financial limitations; services

CFACSF4

Show understanding of the rules that impact on improvements in customer service



Overview

This standard 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.

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 standard 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.

CFACSF4

Show understanding of the rules that impact on improvements in customer service

Performance criteria

Show understanding of the organisational rules and procedures that impact on customer service improvements

You must be able to:

- P1 identify organisational policies, procedures and practices that may impact on proposed improvements in customer service
- P2 show an awareness of the procedures and actions needed to secure approval for proposed improvements in customer service
- P3 agree with colleagues or service partners the actions needed to meet organisational requirements when implementing proposed customer service improvements

Show an understanding of the legislation and external regulation that impact on customer service improvements

You must be able to:

- P4 identify relevant customer related legislation and external legislation that may affect the implementation of customer service improvements
- P5 identify relevant general business legislation and external regulation that may affect the implementation of customer service improvements
- P6 balance the requirements of legislation and external regulation with the needs of the organisation when implementing customer service improvements

CFACSF4

Show understanding of the rules that impact on improvements in customer service

Knowledge and understanding

You need to know and understand:

- K1 organisational policies, procedures and practices that you need to take into account when you propose improvements in customer service
- K2 how you gain approval to change customer service procedures or practices
- K3 the limits of your own authority and who else in the organisation needs to be involved if you cannot authorise improvements alone
- K4 how you would involve colleagues or service partners in the implementation of improvements
- K5 relevant legislation and external regulation relating to consumer protection and data protection
- K6 relevant legislation and external regulation relating to diversity, inclusion and discrimination
- K7 relevant legislation and external regulation relating to health and safety of customers and colleagues
- K8 the need to balance the requirements of legislation and external regulation with the needs and objectives of your organisation
- K9 legislation and external regulation that affect customer service in your industry in particular

CFACSF4

Show understanding of the rules that impact on improvements in customer service

Developed by	Skills CFA
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Validity	Current
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Status	Original
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Originating organisation	Skills CFA
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Original URN	CFACSF4
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Relevant occupations	Customer Service Occupations
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Suite	Customer Service (2013)
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Key words	Rules; regulations; legislation; improve customer service; customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving Information; services; products
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CFACSF5

Show understanding of customer service management



Overview

This Standard 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.

Management responsibilities in a role that is directly related to customer service generally involve a set of skills, knowledge and understanding that might be expected of any manager. However, the nature of customer service means that, if you have specific customer service responsibilities, there is a further skills and knowledge set that you need. This Standard covers the key principles of customer service that influence how it is managed and the links between your management responsibilities and those key principles. The Standard also recognises that knowledge and understanding of customer service principles and systems required in a management role may not be as detailed as that required in a delivery role. Instead, knowledge and understanding must relate clearly to a more strategic appreciation of the principles of customer service. This Standard provides the opportunity to demonstrate the knowledge and understanding that is needed to be effective in customer service management.

CFACSF5

Show understanding of customer service management

Performance criteria

Demonstrate understanding of the principles of customer service that influence the way it is managed

You must be able to:

- P1 exercise customer service management responsibility with consideration for your organisation's service offer, customer expectations and resources
- P2 supervise and develop staff skills in the delivery of customer service
- P3 contribute to the development of customer service policies, culture and ethics in your organisation
- P4 evaluate options for technology that will improve customer service delivery
- P5 carry out risk assessment when dealing with customer service problems

Demonstrate how your management responsibilities link with customer service principles

You must be able to:

- P6 display leadership in a customer service role
- P7 contribute to recruitment and development of staff with appropriate customer service skills
- P8 monitor and maintain effective customer service in your organisation
- P9 promote improvement of customer service in your organisation

CFACSF5

Show understanding of customer service management

Knowledge and understanding

You need to know and understand:

- K1 the customer service management role and responsibilities in relation to your organisation's service offer, customer expectations and customer satisfaction
- K2 how effective customer service depends on a combination of organisational systems and the individual skills of those responsible for customer service delivery
- K3 how organisational systems balance customer satisfaction, financial considerations and the requirements of legislation and regulation
- K4 how effective customer service delivery by staff involves a combination of skills acquired through training and experience and personality
- K5 the options for monitoring customer service performance and the benefits and drawbacks of each option
- K6 the use of customer service as a competitive tool by the commercial sector and its use as a contribution to best value in the public or third sectors
- K7 the key features of a customer service culture in an organisation
- K8 how risk assessment can be applied to customer service situations when dealing with customer service problems
- K9 options for making use of technology to improve customer service delivery
- K10 ways in which an organisation can seek continuous improvement in its customer service
- K11 ways in which the ethical and values base of an organisation's approach to customer service are demonstrated and maintained
- K12 the nature of your responsibilities for customer service resources and systems in your organisation
- K13 your leadership role in customer service delivery
- K14 the key skills and attributes to be sought when recruiting for a person to deliver customer service in your organisation
- K15 options for training, development and/or achievement of qualifications by your organisation's staff in customer service and the benefits and drawbacks of each option
- K16 the importance of the steps you take to monitor and maintain effective delivery of customer service in your organisation
- K17 ways in which you promote continuous improvement within your organisation
- K18 the importance of establishing a strong network of contacts with similar interests in customer service

CFACSF5

Show understanding of customer service management

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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSF5
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	customer service management; key principles; knowledge; understanding; strategic principles

CFACSF6

Follow organisational rules, external regulations and legislation when managing customer service



Overview

This Standard 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 customer

Management responsibilities in a role that is directly related to customer service generally involve actions and a set of knowledge and understanding of legislation and regulation that impact on the management function and the way you fulfil it. Regulation of customer service may originate from within an organisation through policies and procedures or may originate from external regulators. Some legislation applies directly to the relationship between service providers and customers. This Standard is about observing the law and rules and what you must know and understand in order to manage customer service processes effectively.

CFACSF6

Follow organisational rules, external regulations and legislation when managing customer service

Performance criteria

Follow your organisation's rules and culture related to customer service

You must be able to:

- P1 contribute to the development of customer service in your organisation within the organisation's rules and culture
- P2 act within your own authority to promote customer service in your organisation
- P3 use appropriate sources of information about organisational rules, policies and procedures that relate to customer service
- P4 deal with customer service problems and complaints within organisational rules

Follow external regulations and legislation when managing customer service

You must be able to:

- P5 manage customer service activities following external regulations and legislation
- P6 assess the risks resulting from non-compliance with external regulations and legislation when supervising the delivery of customer service
- P7 contribute to development of customer service policies and procedures that comply with external regulations and legislation

CFACSF6

Follow organisational rules, external regulations and legislation when managing customer service

Knowledge and understanding

You need to know and understand:

- K1 the steps that managers can take to encourage development of a customer service culture in your organisation
- K2 the importance of influencing skills for the development of customer service in your organisation
- K3 the opportunities provided and constraints placed on customer service delivery by the policies and procedures of your organisation
- K4 the structure of authority in your organisation relating to customer service management
- K5 the limits of your own authority and who else in the organisation needs to be involved if you cannot authorise customer service management actions alone
- K6 how you should involve service partners in customer service management actions
- K7 the sources of information about organisational rules, policies and procedures that relate to customer service
- K8 your organisation's definition of a complaint and your responsibility in connection with complaints
- K9 the structure of legislation and external regulation that impacts on the customer service of your organisation
- K10 the importance of the regulatory authority of different legal and regulatory bodies for your organisation
- K11 the risks for your organisation presented by non-compliance with different legal and regulatory bodies
- K12 the level of knowledge and understanding needed by people in your organisation involved in customer service delivery regarding relevant legislation and external regulation
- K13 the importance of taking full account of legal and regulatory requirements when planning customer service developments
- K14 the relationship between customer service policy and compliance

CFACSF6

Follow organisational rules, external regulations and legislation when managing customer service

Developed by	Skills CFA
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Validity	Current
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Status	Original
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Originating organisation	Skills CFA
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Original URN	CFACSF6
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Relevant occupations	Customer Services Occupations
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Suite	Customer Service (2013)
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Key words	Management; legislation; regulations; laws; rules; knowledge; understand; managing processes; influencing skills; customer
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