



## Learning outcomes and assessment criteria

Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1	<p>Be able to understand customer service standards required in own organisation</p>	<p>1.1 Explain customer service standards within own organisation</p> <p>1.2 Describe customer service best practice in own sector using research techniques.</p>		
2	<p>Be able to implement sustainable processes for customer satisfaction</p>	<p>2.1 Define sustainable processes taking into account environmental issues</p> <p>2.2 Identify sustainable processes to support customer service standards</p> <p>2.3 Produce a plan for implementation</p> <p>2.4 State customer service standards with relevant key stakeholders</p> <p>2.5 Ensure resources are provided to deliver agreed standards of customer service.</p>		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to support colleagues in delivering customer service standards	3.1 Communicate customer service roles and responsibilities with employees in own organisation.			
4 Be able to manage and develop a culture in own organisation to deliver customer service standards	4.1 Evaluate the culture in own organisation 4.2 Identify techniques for improving motivation amongst employees 4.3 Describe motivational strategies for improving customer service standards.			
5 Be able to monitor customer service levels for continuous improvement	5.1 Describe methods of measuring customer satisfaction 5.2 Develop processes for monitoring customer satisfaction, including customer feedback mechanisms 5.3 Review employee performance to ensure customer service standards and organisational values are met 5.4 Analyse and monitor customer service.			

Learner name: \_\_\_\_\_  
Learner signature: \_\_\_\_\_  
Assessor signature: \_\_\_\_\_  
Internal verifier signature: \_\_\_\_\_  
(if sampled)

Date: \_\_\_\_\_  
Date: \_\_\_\_\_  
Date: \_\_\_\_\_  
Date: \_\_\_\_\_

## Unit content

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### 1 **Be able to understand customer service standards required in own organisation**

*Organisational standards:* definition eg customer and business criticality focus, staff behaviours, dress code, confidentiality of information, ethics, customer service promise, environmental policy and practice, quality service, accuracy and appropriateness of information, up to date; access eg physical access to facilities, services adaptations, call back times, dedicated contacts or helpline, complaints handling, charging policy

*Sector best practice:* research eg customer expectations survey, web-search, research publications, journals, professional organisations, regulatory authorities, code of practice BS8477, competitor policies; regulated requirements eg health and care, education, finance, rail, power; current legalisation eg equality and diversity, data protection, health and safety, trade description, supply of goods and services

### 2 **Be able to implement sustainable processes for customer satisfaction**

*Sustainable approaches for customer satisfaction:* sustaining satisfaction eg regular contact with customers, dedicated helpline, web-based resources, active and proactive support provision, seeking customer feedback, responsive to needs, quality improvement policy and procedures, establishing good reputation, use of electronic communications, ethical provision, waste reduction, recycling

*Supporting customer services standards:* internally eg dedicated staff, promotional literature, clear and accurate communications, prompt response eg telephone, email or intranet site, complaints handling, charging policy, resource support; external eg liaising with professional bodies, regulatory and government agencies, sources of financial support, specialist support

*Implementation plan;* features eg scope, application, relationship to business plans and objectives, need for change, priority, customer service requirements, resource requirements, implementation and target setting, timescales, customer service personnel authority, customer service roles and responsibilities, customer service reward scheme, monitoring and review arrangements, measurement of success indicators, continual improvement process requirements, communication and reporting

*Statement with stakeholders;* promotion eg clear statement of organisation policies and procedures, visit, press release, internal or customer newsletter, organisational website announcement, customer email, promotional event, presentation; stakeholders eg regulatory and trade organisations, customers, senior management, employees, contract staff, trainers and consultants

*Resources:* personnel eg marketing and publicity, customer services, administration, helpline, specialist contact, admissions, finance, support, industrial sector contacts; physical eg adequate provision of phone lines, appropriate venue, provision of time, marketing and promotional materials, case studies of satisfied customers, website, local or national media recognition

### **3 Be able to support colleagues in delivering customer service standards**

*Communication:* level eg across organisation, senior management, line manager, customer facing staff, employees, trainers, consultants; internal eg internal newsletter, organisational website, email, promotional launch event, presentation, customer service reward scheme; roles and responsibilities eg changes to job descriptions, behaviours expectations, changes to appraisal objectives, monitoring and reporting requirements

### **4 Be able to manage and develop a culture in own organisation to deliver customer service standards**

*Culture:* culture requirements eg staff attitudes, management structure or hierarchies, current culture, approach to work, roles and responsibilities, developing and managing change, identifying resistance to change and taking action, identifying and celebrating success; evaluation methods eg management styles eg McGregor's Theory X Authoritarian Management Style and Theory Y Participative Management Style, B Reddin 3-D Theory

*Improving motivation:* theory eg B F Skinner's Behavioural Theory, Maslow's hierarchy of needs, F Herzberg's hygiene factors, V Vroom expectancy theory, E A Locke's goal setting theory, Hackman and Oldham's job enrichment model; employees eg identify needs and expectations, clear personal and professional targets, links to progression or promotion, enhanced role and responsibility, recognising and using individual strengths and experiences, supporting team working

*Motivating strategies:* techniques eg active listening to and involving staff, clear policies and procedures, sharing goals, performance linked rewards, promotional materials; strategies eg staff customer service training, communication of requirements and practice, led from and demonstrated at all levels, identification of key change agents, positive reinforcement of good customer service, sharing of customer service achievement information

### **5 Be able to monitor customer service levels for continuous improvement**

*Satisfaction measurement:* data sources eg repeat and new business, enquiry levels, time taken from initial enquiry to service delivery completion, achievement of customer outcomes requirements; feedback eg customer or stakeholder satisfaction, value for money, organisational staff feedback, identified need for improvements in customer service, cost-benefit analysis, complaints and reason for complaint, local or national media

*Processes for feedback and monitoring:* monitoring methods eg service evaluation feedback questionnaires, telephone survey, focus groups, mystery shoppers, internal employee feedback, quality improvement provision; business data eg repeat business levels, gain or loss of market share, benchmarking against competition; sources of information eg management, employees, customers, competitors, regulatory authorities

*Employee performance:* methods eg self-assessment, peer assessment, line management appraisal, customer feedback; performance assessment eg demonstration of required customer service behaviours against agreed criteria, organisational values and standards, delivery of customer expectations, observation of practice, performance outcomes in meeting goals, record of achievements

*Analysis and monitoring:* information eg qualitative, quantitative, business data, customer feedback information, team and individual employee feedback; customer relationship auditing eg organisational SWOT, PESTLE analysis; proposing improvements eg customer relationship management policy, customer management relationship procedures, techniques, services; presenting outcomes eg presentation, discussion, organisational communication channels, identifying areas for change