

CFACSD19 (SQA Unit Code – FE3Y 04)

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.

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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

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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

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SQA Evidence Requirements to Support this Unit

This Unit is designed to assess the skills and knowledge of candidates in the workplace. Candidate evidence should be generated under workplace conditions (**either paid or voluntary**) and evidence must be generated with different customers on different occasions over a sufficient period of time.

Observation should be the primary and preferred source of evidence of competent performance wherever possible. Observation of candidate performance will be supported by other methods of assessment which may include:

- ◆ witness testimony
- ◆ questioning
- ◆ candidate statement
- ◆ professional discussion
- ◆ product and photographic evidence,
- ◆ relevant active documentation, reports, presentations and
- ◆ other valid evidence which relates directly to learner performance under workplace conditions

A combination of performance and knowledge evidence is required to enable the assessor to confirm that the learner is competent.

Simulation should only be used in exceptional circumstances and it should only be for small parts of the Unit. Simulated assessments **must** be undertaken in a realistic working environment (RWE). A RWE is 'an environment which replicates the key characteristics in which the skill to be assessed is normally employed'. The RWE must provide conditions that are the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Guidelines for using RWE can be found in the Assessment Strategy for Customer Service SVQs at link: <http://www.sqa.org.uk/sqa/16732.html>

SQA's Guide to Assessment is designed to provide support for everyone who assesses for SQA qualifications. It looks at the principles of assessment, and brings together information on assessment in general as well as on best practice in assessment. The Guide to Assessment can be downloaded free from SQA's website www.sqa.org.uk

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Developed by Skills CFA

Version number 2

Date approved January 2013

Indicative review date January 2016

Validity Current

Status Original

Originating organisation Skills CFA

Original URN CFACSD19

Relevant occupations Customer Service Occupations

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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