

CFACSD13 (SQA Unit Code – FE3D 04) Monitor the quality of customer service transactions



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.

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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

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- 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

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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

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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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Relevant occupations Customer Service Occupations

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Suite

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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