

# CFACSB13 (SQA Unit Code – H9Y6 04)

## Plan, organise and control customer service operations



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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.

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.

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### Performance criteria

#### Plan customer service operations

*You must be able to:*

- 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

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#### 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

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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](http://www.sqa.org.uk)

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**Relevant occupations** Customer Service Occupations

## **CFACSB13 (SQA Unit Code – H9Y6 04)**

### **Plan, organise and control customer service operations**

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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