

CFACSF5 (SQA Unit Code – HA01 04)

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.

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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

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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

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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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