

**Unit: CS5 Plan, organise and control customer service operations (ICS Unit 28))**

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**Overview**

Delivering effective customer service is key to winning and maintaining customer loyalty. In the Financial Services sector, customer loyalty is particularly important. 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.

***Outcomes of effective performance***

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|---------|--|---------|---|
| CS5/O1  | You analyse customer expectations and define the service offer designed to meet those expectations                           | CS5/O11 | You evaluate how effectively agreed outcomes and processes are being achieved                     |
| CS5/O2  | You develop specific plans that will ensure sustainable and consistent delivery of customer service                          | CS5/O12 | You modify your plans for customer service operations in the light of your evaluation             |
| CS5/O3  | identify any contingencies that may occur, assess their risks and develop effective plans to deal with them                  | CS5/O13 | You collect information on the nature of the problem and assess the likely impact on the customer |
| CS5/O4  | You plan how you will monitor and evaluate customer service operations   | CS5/O14 | You identify the causes of the problem and possible solutions                                     |
| CS5/O5  | You negotiate the availability of people and other resources that you need to implement your customer service delivery plans | CS5/O15 | You evaluate possible solutions against customer expectations and organisational needs            |
| CS5/O6  | You develop specific, measurable and realistic targets for the staff who deliver customer service                            | CS5/O16 | You select and implement an acceptable solution with the minimum possible disruption to customers |
| CS5/O7  | You ensure that planned resources are available when required  | CS5/O17 | You monitor the implementation of the solution and, where necessary, make adjustments             |
| CS5/O8  | You brief staff on their objectives and targets  |         |   |
| CS5/O9  | You encourage feedback from staff and customers and use their feedback to modify objectives and targets                      |         |   |
| CS5/O10 | Collect and analyse feedback from customers and staff on customer service operations   |         |   |

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***Behaviours which underpin effective performance***

- CS5/B1 You make the best use of your time and the resources available to you
- CS5/B2 You present information clearly and concisely
- CS5/B3 You support others in your team
- CS5/B4 You look for more efficient ways of working
- CS5/B5 You carry out tasks with due regard to your organisation's policies and procedures, including those covering health and safety at work
- CS5/B6 You comply with legal requirements, industry regulations and professional codes

***Knowledge and understanding***

- 1 How to develop plans for customer service operations and what these plans should contain
- 2 How to identify and work within allocated budgets and time targets for customer service operations
- 3 The types of contingencies that may occur during customer service operations, how to assess their risks and plan how to deal with them
- 4 The types of monitoring methods you can use and the criteria you should select to evaluate the effectiveness of customer service operations
- 5 How to develop objectives and targets for staff
- 6 The importance of briefing staff and how to do so effectively
- 7 The importance of monitoring the quality of your customer service operations
- 8 The types of problems that are likely to occur in your customer service operations and how to plan for dealing with these
- 9 The importance of liaising with customers and colleagues about problems and possible solutions
- 10 How to identify and evaluate possible solutions