

## M&LF10 Develop a customer-focused organisation

### Overview

#### What this Unit is about

This Unit is about ensuring that your organisation puts customers first. The organisation's vision, values, processes and systems, for example, should all be clearly driven by and geared to satisfying customer needs.

In this Unit, 'customer' refers to both internal and external customers.

For the purposes of this Unit, 'organisation' can mean a self-contained entity such as a private sector company, a charity or a local authority, or a significant operating Unit, with a relative degree of autonomy, within a larger organisation.

#### Who is the Unit for?

The Unit is recommended for senior managers.

#### Links to other Units

This Unit is linked to Unit **B9. Develop the culture of your organisation**, **F9. Build your organisation's understanding of its market and customers**, **F12. Improve organisational performance** and **F17. Manage the delivery of customer service in your area of responsibility** in the overall suite of National Occupational Standards for Management and Leadership.

There is also a suite of National Occupational Standards for Customer Service which is aimed at those in customer service roles or whose roles have a significant customer service component. You can obtain further information from the Institute of Customer Service (ICS) on tel. 01206 571 716 or at the ICS website ([www.instituteofcustomerservice.com](http://www.instituteofcustomerservice.com)).

If your organisation is a small firm, you should look at Unit *C1 Look after your customers*, which has been developed by the Small Firms Enterprise and Development Initiative (SFEDI) specifically for small firms and which **may** be more suitable to your needs. You can obtain information on the Unit from SFEDI on tel. 0114 241 2155 or at the SFEDI website ([www.sfedi.co.uk](http://www.sfedi.co.uk)).

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### **Skills**

Listed below are the main generic 'skills' that need to be applied in developing a customer-focused organisation. These skills are explicit/implicit in the detailed content of the Unit and are listed here as additional information.

- ◆ Communicating
- ◆ Thinking strategically
- ◆ Thinking with a focus on customers
- ◆ Evaluating
- ◆ Monitoring
- ◆ Motivating
- ◆ Leadership
- ◆ Empowering
- ◆ Building consensus
- ◆ Reviewing

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### **Performance Criteria**

*You must be able to:*

- 1 Establish a shared vision and understanding of how staff in your organisation will work with customers.
- 2 Establish a set of customer-based values and beliefs which develops suitable skills, behaviours and attitudes leading to an environment that puts the customer first.
- 3 Ensure that customer-focused sustainable processes and systems exist throughout the organisation.
- 4 Ensure that there are schemes in place that maintain staff loyalty and commitment to providing a level of service that beats customers' expectations.
- 5 Establish partnerships, where appropriate, with other organisations to maintain and improve services to customers.
- 6 Ensure that joint activities are undertaken with customers in order to identify and make improvements to the level of customer service provided by your organisation.
- 7 Measure, periodically, the level of customer service your organisation is providing.

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### **Behaviours**

*You will exhibit the following behaviours:*

- 1 You constantly seek to improve performance.
- 2 You find practical ways to overcome barriers.
- 3 You show a clear understanding of different customers and their needs.
- 4 You give people opportunities to provide feedback and you respond appropriately.
- 5 You develop systems to gather and manage information and knowledge effectively, efficiently and ethically.
- 6 You articulate a vision that generates excitement, enthusiasm and commitment.
- 7 You model behaviour that shows respect, helpfulness and co-operation.
- 8 You advocate customers' interests within your organisation.

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### **Knowledge and Understanding**

*You need to know and understand:*

### **General knowledge and understanding**

- 1 The principles of effective customer service.
- 2 The factors that make customers satisfied.
- 3 The importance of achieving customer satisfaction.
- 4 How to measure the level of customer service being provided.
- 5 The benefits of forming partnerships to maintain and improve customer service.
- 6 Best practice in customer service outside your own sector.
- 7 Techniques and reward strategies for motivating staff.
- 8 Sustainable process/systems design and management.

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### **Knowledge and Understanding**

*You need to know and understand:*

### **Industry/sector specific knowledge and understanding**

- 1 Current and emerging trends that are likely to affect your products and/or services.
- 2 Developments in technology.
- 3 Where to make effective strategic partnerships.
- 4 The legal and regulatory framework within which you work, including customer and consumer rights, relevant codes of practice and ethical codes.

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### **Knowledge and Understanding**

*You need to know and understand:*

### **Context specific knowledge and understanding**

- 1 Your organisation's products and/or services.
- 2 The overall vision, objectives and associated plans of your organisation.
- 3 Your organisation's customers.
- 4 The strengths and weaknesses of your organisation in terms of satisfying customers.
- 5 How a change in your market, structure, products or services will affect your customers.
- 6 The activities and services of your competitors or similar organisations, and how this may affect your products, services and processes.

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### Evidence Requirements

PC	Evidence of Performance Criteria: ♦ possible examples of evidence	Behaviours	Knowledge and Understanding		
			General	Industry specific	Context specific
<b>Plans, procedures, records of meetings and other communications that clearly articulate your vision for customer service and show how it is to be translated into action:</b>					
PC1 PC2 PC3	♦ mission, values, vision or policy statements, operational objectives and plans that you have been actively involved in developing that express the organisation's commitment to its customers	3, 6, 8	1, 2, 3	1, 4	1, 2, 3, 4, 5, 6
	♦ customer expectations and requirements surveys, benchmarking and best practice surveys and analyses, that you have commissioned to establish customer service standards	3, 5, 8	1, 2, 3, 4, 6	4	1, 3, 4, 5, 6
	♦ systems and procedures that you have introduced to enable customer service to be achieved	2, 3, 8	1, 2, 6, 8	-	1, 4
	♦ newsletters, intranet pages, e-mails, memos, systems and procedure specifications and other documents you have initiated, and notes, presentations and materials from team briefings and other meetings and discussions you have led to communicate the organisation's customer focus commitment and ensure its practical implementation	3, 6, 7, 8	1, 2, 3	-	2
	♦ personal statement (reflections on your role in describing the vision for customer service, defining the standards of service required, and ensuring the people, systems and procedures are in place to achieve your vision)	3, 6, 8	1, 2, 3	4	1, 2, 3, 4, 5, 6
<b>Customer service monitoring and review reports you have commissioned and evaluated to assess customer focus and service levels:</b>					
PC3 PC6 PC7	♦ monitoring reports (eg 'mystery shopper') and customer feedback surveys and analyses that you have commissioned to measure customer service performance	1, 3, 4, 5	1, 2, 4	4	1, 3, 4, 5, 6
	♦ analyses of data on customer churn and loyalty/repurchase rates you have prepared	1, 5	1, 2, 4	4	1, 3, 4, 5, 6
	♦ proposals, e-mails, memos, action plans and other records of action you have taken in response to surveys and analyses of customer service performance	1, 2, 4, 5	1, 2, 3, 8	-	1, 3, 4, 5, 6
	♦ personal statement (reflections on your role in monitoring customer service standards in your organisation)	1, 3, 4, 5	1, 2, 4	4	1, 3, 4, 5, 6

PC	Evidence of Performance Criteria: ♦ possible examples of evidence	Behaviours	Knowledge and Understanding		
			General	Industry specific	Context specific
PC3 PC4	<b>Staff reward systems, development activities and other strategies you have organised to bring about a customer focussed organisation:</b>				
	♦ training needs analyses, skills matrices and other systems to identify staff development needs	1, 2, 8	1, 3, 8	-	4
	♦ plans and evaluations of customer service training activities	1	1, 3, 8	-	-
	♦ recruitment strategies, role descriptions, induction and training and development activities that you have initiated to ensure that the organisation's employees have the knowledge and skills they need to provide the level of customer service required	1	1, 3, 7, 8	-	4
	♦ descriptions of the employee performance review and appraisals systems, job enrichment or improvement systems, performance related rewards and incentives schemes and other initiatives you have developed to encourage the level of customer service required	1	1, 3, 7, 8	-	-
	♦ personal statement (reflections on your role in ensuring that employees are able and committed to meeting and surpassing customer service standards in your organisation)	1, 2, 8	1, 3, 7, 8	-	4
PC5 PC6	<b>Records of activities you have organised that are designed to bring about improvements in customer service and meet or surpass customer expectations:</b>				
	♦ notes and minutes of meetings, e-mails and letters, partnership agreements and contracts, customer service standards and procedure specifications with other organisations (eg order fulfilment and call centres) that you have organised, to ensure that they can provide the level of customer service required	1, 2, 3, 7	1, 2, 3, 5	1, 2, 3, 4	3, 4, 5, 6
	♦ agenda, notes or reports of meetings of staff and external organisations that you have organised and participated in to review customer service and identify opportunities for improvement	1, 2, 4, 7, 8	1, 2, 3, 5	1, 2, 3, 4	3, 4, 5, 6
	♦ personal statement (reflections on your role in ensuring that partnerships with other organisations deliver customer service to the required standard)	1, 2, 4, 7, 8	1, 2, 3, 5	1, 2, 3, 4	3, 4, 5, 6