

## **FE3D 04 (CFACSD13) Monitor the Quality of Customer Service Transactions**

This Unit has the following Elements:

D13.1 Prepare to monitor the quality of customer service transactions.

D13.2 Monitor the quality of customer service transactions.

D13.3 Give feedback on the quality of customer service transactions.

### **Unit Summary**

This Unit 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 Unit 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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### D13.1 Prepare to monitor the quality of customer service transactions

#### Performance Criteria

*You must consistently:*

- D13.1.1 Identify the criteria against which quality of customer service transactions will be monitored.
- D13.1.2 Agree a sampling frame for monitoring customer service transactions.
- D13.1.3 Follow organisational procedures to ensure your monitoring plans are compliant with any need for staff and customers to know they are being observed.
- D13.1.4 Identify ratings and scales against which quality of customer service transactions can be measured.
- D13.1.5 Ensure that you are totally familiar with the customer service procedures for transactions you are monitoring.

### D13.2 Monitor the quality of customer service transactions

#### Performance Criteria

*You must consistently:*

- D13.2.1 Carry out spot checks on or observations of the quality of customer service transactions.
- D13.2.2 Carry out planned and routine checks on or observations of the quality of customer service transactions.

### D13.2 (continued)

- D13.2.3 Observe or listen to a colleague dealing with a customer service transaction.
- D13.2.4 Record your observations of a colleague's performance against agreed quality criteria.
- D13.2.5 Make judgements about your colleague's quality of service delivery by allocating a performance rating against a defined and agreed rating scale.
- D13.2.6 Analyse and summarise your observations to identify patterns and trends in your colleague's performance.

### D13.3 Give feedback on the quality of customer service transactions

#### Performance Criteria

*You must consistently:*

- D13.3.1 Engage with your colleague in preparation for giving feedback on the quality of their customer service delivery.
- D13.3.2 Provide positive feedback to your colleague by identifying features of customer service that they delivered particularly well.
- D13.3.3 Give feedback to your colleague regarding features of their customer service delivery that would benefit from development.
- D13.3.4 Propose actions for coaching or training of a colleague in areas that would improve their customer service delivery.
- D13.3.5 Maintain records of customer service quality monitoring and action plans for improvements.

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### **Knowledge and Understanding for the whole Unit**

*To be competent at monitoring the quality of customer service transactions you must know and understand:*

- D13a The criteria against which the quality of customer service delivery is judged in your organisation.
- D13b Ways to construct a representative sample of customer service transactions in order to monitor quality.
- D13c The importance of compliance with guidelines about ensuring customers and colleagues know they are being observed to monitor quality of service.
- D13d Ways to define ratings and scales against which customer service transactions can be judged.
- D13e Your organisation's procedures and guidelines for customer service delivery.
- D13f Ways to record details of customer service transactions you have observed in order to provide feedback.
- D13g Techniques for analysing and summarising observations in order to identify patterns and trends in customer service delivery.
- D13h The importance of providing positive feedback to a colleague prior to identifying areas for improvement.
- D13i Sources of information about coaching and training options to improve customer service delivery.
- D13j The importance of keeping detailed records of coaching and training relating to customer service delivery.

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### **Evidence Requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

**There are no additional evidence requirements other than those expressed within the Unit.**







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**Notes/Comments**

The candidate has satisfied the assessor and internal verifier that the performance evidence has been met.

**Candidate's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Assessor's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Internal verifier's signature** \_\_\_\_\_ **Date** \_\_\_\_\_