

FM62 04 (CFAMLF17) Manage the Delivery of Customer Service in Your Area of Responsibility

Overview

What this Unit is about

This Unit is about managing the delivery of customer service in the manager's area of responsibility. The term 'customer' includes external customers and internal customers in other parts of the organisation.

Who is the Unit for?

The Unit is recommended particularly for first line managers who are required to manage the delivery of customer service as part of a broader management role. It is not aimed at specialist customer service managers, who should refer to the Customer Service National Occupational Standards.

Links to other Units

This Unit is linked to Units **F10. Develop a customer-focused organisation** and **F11. Manage the achievement of customer satisfaction** in the overall suite of National Occupational Standards for Management and Leadership. There is also a suite of Customer Service National Occupational Standards which is aimed at those in customer service roles or whose roles have a significant customer service component. Of particular relevance are Units *25 Organise the Delivery of Reliable Customer Service* and *32 Monitor and Solve Customer Service Problems*.

You can obtain further information from the Institute of Customer Service on www.instituteofcustomerservice.com. If your organisation is a small firm, you should look at Units *WB11 Decide How You Will Treat Your Business Customers* and *WB12 Deliver a Good Service to Your Customers* developed by the Small Firms Enterprise and Development Initiative specifically for small firms and which **may** be more suitable to your needs. You can obtain information on these Units from www.sfedl.co.uk.

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Skills

Listed below are the main generic 'skills' that need to be applied in managing the delivery of customer service in your area of responsibility. These skills are explicit/implicit in the detailed content of the Unit and are listed here as additional information.

- ◆ Acting assertively
- ◆ Analysing
- ◆ Communicating
- ◆ Information management
- ◆ Managing conflict
- ◆ Monitoring
- ◆ Obtaining feedback
- ◆ Planning
- ◆ Problem-solving
- ◆ Researching
- ◆ Reviewing
- ◆ Team-building
- ◆ Thinking with a focus on customers
- ◆ Valuing and supporting others

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Performance Criteria

You must be able to:

- 1 Establish clear and measurable standards of customer service, taking into account customers' expectations, your organisation's resources and any legal or regulatory requirements.
- 2 Organise staffing and other resources to meet customer service standards, taking account of varying levels of demand and likely contingencies.
- 3 Ensure customer service staff are competent to carry out their duties, and provide them with any necessary support.
- 4 Ensure staff understand the standards of customer service they are expected to deliver and the extent of their autonomy in responding to customers' requests and problems.
- 5 Take responsibility for dealing with customers' requests and problems referred to you, seeking advice from specialists and/or more senior managers, where necessary.
- 6 Ensure customers are kept informed about the actions you are taking to deal with their requests or problems.
- 7 Encourage staff and customers to provide feedback on their perceptions of the standards of customer service.
- 8 Continuously monitor the standards of customer service delivered, customers' requests and problems and feedback from staff and customers.
- 9 Analyse customer service data to identify the causes of problems and opportunities for improving customer service.
- 10 Make or recommend changes to processes, systems and/or standards in order to improve customer service.

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Behaviours

You will exhibit the following behaviours:

- 1 You respond quickly to crises and problems with a proposed course of action.
- 2 You make time available to support others.
- 3 You demonstrate a clear understanding of different customers and their real and perceived needs.
- 4 You give people opportunities to provide feedback and you respond appropriately.
- 5 You empower staff to solve customer problems within clear limits of authority.
- 6 You take personal responsibility for resolving customer problems referred to you by other staff.
- 7 You recognise recurring problems and promote changes to structures, systems and processes to resolve these.
- 8 You prioritise objectives and plan work to make the best use of time and resources.
- 9 You keep promises and honour commitments.
- 10 You take timely decisions that are realistic for the situation.

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Knowledge and Understanding

You need to know and understand:

General Knowledge and Understanding

- 1 How to establish clear and measurable standards of customer service, taking into account customers' expectations and your organisation's resources.
- 2 How to organise staffing and other resources to meet customer service standards, and the importance of taking account of varying levels of demand and likely contingencies.
- 3 How to identify likely contingencies when organising staffing and other resources.
- 4 How to identify sustainable resources and ensure their effective use when organising the delivery of customer service.
- 5 The importance of ensuring customer service staff are competent to carry out their duties, and providing them with any necessary support, and how to do so.
- 6 The importance of ensuring staff understand the standards of customer service they are expected to deliver and the extent of their autonomy in responding to customers' requests and problems.
- 7 The importance of taking responsibility for dealing with customers' requests and problems referred to you, seeking advice from specialists and/or more senior managers, where necessary.
- 8 The importance of keeping customers informed about the actions you are taking to deal with their requests or problems.
- 9 How to identify and manage potential issues before they escalate into problems.
- 10 How to deal with customers' requests and/or problems.
- 11 The importance of encouraging staff and customers to provide feedback on their perceptions of the standards of customer service.
- 12 How to monitor the standards of customer service delivered, customers' requests and problems and feedback from staff and customers, and the importance of doing so continuously.
- 13 The types of customer service data available and how to analyse such data to identify the causes of problems and opportunities for improving customer service.
- 14 Types of problems and opportunities for improving customer service.
- 15 The importance of making or recommending changes to processes, systems and/or standards in order to improve customer service, and how to do so.

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Knowledge and Understanding

You need to know and understand:

Industry/sector specific Knowledge and Understanding

- 1 Industry/sector requirements for the delivery of customer service.

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Knowledge and Understanding

You need to know and understand:

Context specific Knowledge and Understanding

- 1 Your organisation's customers and their expectations of customer service.
- 2 Your organisation's complaints policy and procedures.
- 3 Your organisation's available resources.
- 4 Your organisation's staffing in relation to delivering customer service.
- 5 Sources of advice, guidance and support from customer service specialists and/or more senior managers.

Evidence Requirements

To achieve this Unit you will need to ensure that your evidence covers all Performance Criteria, behaviours and Knowledge and Understanding.

The following table provides you with possible examples of evidence.

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Evidence Requirements

PC	Evidence of Outcomes: ♦ possible examples of evidence	Behaviours	Knowledge and Understanding		
			General	Industry specific	Context specific
Actions you have taken to manage the delivery of customer service in your area of responsibility:					
PC1 PC2 PC3 PC4 PC5 PC6 PC7 PC8 PC9 PC10	♦ notes of briefings and meetings; e-mails and memos; handbooks, procedure manuals and other guidance on customer service standards in your area of responsibility	2, 5	1, 5, 6, 9, 10	1	1, 2
	♦ notes of briefings and meetings; e-mails and memos showing staffing and resource plans which are organised to meet customer service standards, taking account of varying levels of demand and likely contingencies	2, 8	2, 3, 4, 10	1	1, 3, 4
	♦ copies of policies, organisational policies and your notes or other records of legal requirements relating to customer service	2	1, 5	1	2
	♦ training/development opportunities you have made available to individuals in your area of responsibility	2, 5	1, 5, 6	1	1
	♦ notes, reports, e-mails and records of your meetings with or requests for support from your manager or quality specialists	1	7	1	1, 5
	♦ notes, e-mails and records of feedback to customers keeping them informed about the actions you are taking to deal with their requests or problems	2, 3, 6, 9, 10	7, 8, 10	1	1, 2
	♦ feedback systems you have put in place to encourage staff and customers to provide feedback on their perceptions of the standards of customer service	2, 3, 4	11	1	-

PC	Evidence of Outcomes: ◆ possible examples of evidence	Behaviours	Knowledge and Understanding		
			General	Industry specific	Context specific
	◆ reports and records of meetings monitoring the standards of customer service delivered, customers' requests and problems and feedback from staff and customers	3, 6, 9	12	1	1, 2
	◆ reports, charts, records of meetings and other evidence of analysis of customer service data to identify the causes of problems and opportunities for improving customer service	3, 6, 7	9, 13	1	1
	◆ notes, emails, reports and records of meetings making or recommending changes to processes, systems and/or standards in order to improve customer service	1, 3, 7, 10	10, 14	1	1
	◆ personal statement (reflections on your role in managing the delivery of customer service in your area of responsibility)	1, 2, 3, 4, 5, 6, 7, 8, 9, 10	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14	1	1, 2, 3, 4, 5
	◆ witness statement (comments from others on your role in managing the delivery of customer service in your area of responsibility)	-	-	-	-

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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** _____