
Overview

This unit is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

This Unit is about how you deliver and maintain excellent and reliable customer service. Your role may or may not involve supervisory or management responsibilities but you are expected to take some responsibility for the resources and systems you use which support the service that you give. In your job you must be alert to customer reactions and know how they can be used to improve the service that you give. In addition, customer service information must be recorded to support reliable service.

CFACSB10

Organise the delivery of reliable customer service

Performance criteria

You must be able to:

Plan and organise the delivery of reliable customer service

- P1 plan, prepare and organise everything you need to deliver services or products to different types of customers
- P2 organise what you do to ensure that you are consistently able to give prompt attention to your customers
- P3 reorganise your work to respond to unexpected additional workloads

Review and maintain customer service delivery

- P4 maintain service delivery during very busy periods and unusually quiet periods
- P5 maintain service delivery when systems, people or resources have let you down
- P6 consistently meet your customers' expectations
- P7 balance the time you take with your customers with the demands of other customers seeking your attention
- P8 respond appropriately to your customers when they make comments about the products or services you are offering
- P9 alert others to repeated comments made by your customers
- P10 take action to improve the reliability of your service based on customer comments
- P11 monitor the action you have taken to identify improvements in the service you give to your customers

Use recording systems to maintain reliable customer service

- P12 record and store customer service information accurately following organisational guidelines
- P13 select and retrieve customer service information that is relevant, sufficient and in an appropriate format
- P14 quickly locate information that will help solve a customer's query
- P15 supply accurate customer service information to others using the most appropriate method of communication

CFACSB10

Organise the delivery of reliable customer service

Knowledge and understanding

You need to know and understand:

- K1 organisational procedures for unexpected situations and your role within them
- K2 resource implications in times of staff sickness and holiday periods and your responsibility at these times
- K3 the importance of having reliable and fast information for your customers and your organisation
- K4 organisational procedures and systems for delivering customer service
- K5 how to identify useful customer feedback and how to decide which feedback should be acted on
- K6 how to communicate feedback from customers to others
- K7 organisational procedures and systems for recording, storing, retrieving and supplying customer service information
- K8 legal and regulatory requirements regarding the storage of data

CFACSB10

Organise the delivery of reliable customer service

Developed by	CFA Business Skills @ Work
Version number	1
Date approved	January 2010
Indicative review date	January 2013
Validity	Current
Status	Original
Originating organisation	Institute of Customer Service
Original URN	B10
Relevant occupations	Administration; Sales and Customer Services Occupations; Customer Service Occupations
Suite	Customer Service 2010
Key words	organising, delivery, reliable, resources, systems, support service, customer service, communication, problem solving, behaviours, work with others, team working, giving information, receiving information services, products

Overview

This unit is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

To improve relationships with your customers you need to deliver consistent and reliable customer service. In addition, customers need to feel that you genuinely want to give them high levels of service and that you make every possible effort to meet or exceed their expectations. This encourages loyalty from external customers or longer - term service partnerships with internal customers. You need to be proactive in your dealings with your customers and to respond professionally in all situations. You need to negotiate between your customers and your organisation or department in order to find some way of meeting your customers' expectations. In addition you need to make extra efforts to delight your customers by exceeding their customer service expectations.

CFACSB11

Improve the customer relationship

Performance criteria

You must be able to:

Improve communication with your customers

- P1 select and use the best method of communication to meet your customers' expectations
- P2 take the initiative to contact your customers to update them when things are not going to plan or when you require further information
- P3 adapt your communication to respond to individual customers' feelings

Balance the needs of your customer and your organisation

- P4 meet your customers' expectations within your organisation's service offer
- P5 explain the reasons to your customers sensitively and positively when their expectations cannot be met
- P6 identify alternative solutions for your customers either within or outside the organisation
- P7 identify the costs and benefits of these solutions to your organisation and to your customers
- P8 negotiate and agree solutions with your customers which satisfy them and are acceptable to your organisation
- P9 take action to satisfy your customers with the agreed solution when balancing their needs with those of your organisation

Exceed customer expectations to develop the relationship

- P10 make extra efforts to improve your relationship with your customers
- P11 recognise opportunities to exceed your customers' expectations
- P12 take action to exceed your customers' expectations within the limits of your own authority
- P13 gain the help and support of others to exceed your customers' expectation

CFACSB11

Improve the customer relationship

Knowledge and understanding

You need to know and understand:

- K1 how to make best use of the method of communication chosen for dealing with your customers
- K2 how to negotiate effectively with your customers
- K3 how to assess the costs and benefits to your customer and your organisation of any unusual agreement you make
- K4 the importance of customer loyalty and/or improved internal customer relationships to your organisation

CFACSB11

Improve the customer relationship

Developed by	CFA Business Skills @ Work
Version number	1
Date approved	January 2010
Indicative review date	January 2013
Validity	Current
Status	Original
Originating organisation	Institute of Customer Service
Original URN	B11
Relevant occupations	Administration; Sales and Customer Services Occupations; Customer Service Occupations
Suite	Customer Service 2010
Key words	relationships, customer service, reliable, exceed expectations, external customer, internal customer, loyalty, service partnerships, customer service, communication, problem solving, behaviours, work with others, giving information, teamwork

CFACSB13

Plan, organise and control customer service operations



Overview

This unit is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

Delivering effective customer service is key to winning and maintaining customer loyalty. 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. This unit is about managing the delivery of services to the customer.

CFACSB13

Plan, organise and control customer service operations

Performance criteria

You must be able to:

Plan customer service operations

- P1 analyse customer expectations and define the service offer designed to meet those expectations
- P2 develop specific plans that will ensure sustainable and consistent delivery of customer service
- P3 identify any contingencies that may occur, assess their risks and develop effective plans to deal with them
- P4 plan how you will monitor and evaluate customer service operations

Supervise customer service operations

- P5 negotiate the availability of people and other resources that you need to implement your customer service delivery plans
- P6 develop specific, measurable and realistic targets for the staff who deliver customer service
- P7 ensure that planned resources are available when required
- P8 brief staff on their objectives and targets
- P9 encourage feedback from staff and customers and use their feedback to modify objectives and targets
- P10 collect and analyse feedback from customers and staff on customer service operations
- P11 evaluate how effectively agreed outcomes and processes are being achieved
- P12 modify your plans for customer service operations in the light of your evaluation.

Deal with problems relating to customer service operations

- P13 collect information on the nature of the problem and assess the likely impact on the customer
- P14 identify the causes of the problem and possible solutions
- P15 evaluate possible solutions against customer expectations and organisational needs
- P16 select and implement an acceptable solution with the minimum possible disruption to customers
- P17 monitor the implementation of the solution and, where necessary, make adjustments

CFACSB13

Plan, organise and control customer service operations

Knowledge and understanding

You need to know and understand:

- K1 how to develop plans for customer service operations and what these plans should contain
- K2 how to identify and work within allocated budgets and time targets for customer service operations
- K3 the types of contingencies that may occur during customer service operations, how to assess their risks and plan how to deal with them
- K4 the types of monitoring methods you can use and the criteria you should select to evaluate the effectiveness of customer service operations
- K5 how to develop objectives and targets for staff
- K6 the importance of briefing staff and how to do so effectively
- K7 the importance of monitoring the quality of your customer service operations
- K8 the types of problems that are likely to occur in your customer service operations and how to plan for dealing with these
- K9 the importance of liaising with customers and colleagues about problems and possible solutions
- K10 how to identify and evaluate possible solutions

CFACSB13

Plan, organise and control customer service operations

Developed by	CFA Business Skills @ Work
Version number	1
Date approved	January 2010
Indicative review date	January 2013
Validity	Current
Status	Original
Originating organisation	Institute of Customer Service
Original URN	B13
Relevant occupations	Administration; Sales and Customer Services Occupations; Customer Service Occupations
Suite	Customer Service 2010
Key words	delivery, customer loyalty, monitoring, solving problems, positive impression, customer service, communication, problem solving, behaviours, work with others, giving information, teamwork, receiving information services, products

Overview

This Standard is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

This Standard is all about how you deliver consistent and reliable service to customers. As well as being good with people, you need to work with your organisation's service systems to meet or exceed customer expectations. In your job there will be many examples of how you combine your approach and behaviour with your organisation's systems. You need to prepare for each transaction with a customer, deal with different types of customers in different circumstances and check that what you have done has met customer expectations. To meet this standard you have to deliver excellent customer service over and over again.

CFACSB2

Deliver reliable customer service

Performance criteria

Prepare to deal with your customers

You must be able to:

- P1 keep your knowledge of your organisation's services or products up-to-date
- P2 ensure that the area you work in is tidy, safe and organised efficiently
- P3 prepare and arrange everything you need to deal with your customers before your shift or period of work commences

Give consistent service to customers

You must be able to:

- P4 make realistic customer service promises to your customers
- P5 ensure that your promises balance the needs of your customers and your organisation
- P6 keep your promises to your customers
- P7 inform your customers if you cannot keep your promises due to unforeseen circumstances
- P8 recognise when your customers' needs or expectations have changed and adapt your service to meet their new requirements
- P9 keep your customers informed if delivery of the service needs to involve passing them on to another person or organisation

Check customer service delivery

You must be able to:

- P10 check that the service you have given meets your customers' needs and expectations
- P11 identify when you could have given better service to your customers and how your service could have been improved
- P12 share information with colleagues and service partners to maintain and improve your standards of service delivery.

CFACSB2

Deliver reliable customer service

Knowledge and understanding

You need to know and understand:

- K1 your organisation's services or products
- K2 your organisation's procedures and systems for delivering customer service
- K3 methods or systems for measuring an organisation's effectiveness in delivering customer service
- K4 your organisation's procedures and systems for checking service delivery
- K5 your organisation's requirements for health and safety in your area of work

CFACSB2

Deliver reliable customer service

Developed by	Skills CFA
Version number	1
Date approved	January 2013
Indicative review date	January 2016
Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSB2
Relevant occupations	Customer Service Occupations; Construction and Building Trades NEC; Paper and wood machine operatives; Sales and related occupations NEC; Other goods handling and storage occupations NEC
Suite	Customer Service (2013); Building Maintenance Multi-trade Repair and Refurbishment Operations; Event Security Operations; Wood Merchants
Key words	reliability, delivery, service systems, customer expectations, efficiency, balance needs, customer service, communication, problem solving, behaviours, work with others, teamwork, Wood, timber, sales; merchants;

CFACSC3

Resolve customer service problems



Overview

This unit is part of the Customer Service Theme of Handling Problems. This Theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

This unit is about what to do when it is difficult to meet customer expectations. Even if the service you give is excellent, some customers experience problems. Part of your job is to help to resolve those problems. There is likely to be a problem if customer expectations are not met. This may be because your customer's expectations involve more than you can offer or because your service procedures have not been followed. Some problems are reported by customers and sometimes you spot the problem first and resolve it before your customer has even noticed. As soon as you are aware of a problem, you need to consider the options and then choose a way to put it right. This unit is particularly important in customer service because many customers judge how good the customer service of your organisation is by the way problems are handled.

CFACSC3

Resolve customer service problems

Performance criteria

You must be able to:

Spot customer service problems

- P1 listen carefully to your customers about any problem they have raised
- P2 ask your customers about the problem to check your understanding
- P3 recognise repeated problems and alert the appropriate authority
- P4 share customer feedback with others to identify potential problems before they happen
- P5 identify problems with systems and procedures before they begin to affect your customers

Pick the best solution to resolve customer service problems

- P6 identify the options for resolving a customer service problem
- P7 work with others to identify and confirm the options to resolve a customer service problem
- P8 work out the advantages and disadvantages of each option for your customer and your organisation
- P9 pick the best option for your customer and your organisation
- P10 identify for your customer other ways that problems may be resolved if you are unable to help

Take action to resolve customer service problems

- P11 discuss and agree the options for solving the problem with your customer
- P12 take action to implement the option agreed with your customer
- P13 work with others and your customer to make sure that any promises related to solving the problem are kept
- P14 keep your customer fully informed about what is happening to resolve the problem
- P15 check with your customer to make sure the problem has been resolved to their satisfaction
- P16 give clear reasons to your customer when the problem has not been resolved to their satisfaction

CFACSC3

Resolve customer service problems

Knowledge and understanding

You need to know and understand:

- K1 organisational procedures and systems for dealing with customer service problems
- K2 how to defuse potentially stressful situations
- K3 how to negotiate
- K4 the limitations of what you can offer your customer
- K5 types of action that may make a customer problem worse and should be avoided

CFACSC3

Resolve customer service problems

Developed by	CFA Business Skills @ Work
Version number	1
Date approved	January 2010
Indicative review date	January 2013
Validity	Current
Status	Original
Originating organisation	Institute of Customer Service
Original URN	C3
Relevant occupations	Administration; Sales and Customer Services Occupations; Customer Service Occupations
Suite	Customer Service 2010
Key words	handling problems, resolving problems, customer expectations, choosing options, customer service, communication, problem solving, behaviours, work with others, giving information, teamwork, receiving information services, products

FSPFCS01

Provide callers with specialised assistance in a financial services environment



Overview

This unit is about helping callers who require specialist assistance. This may include technical IT assistance (e.g., in dealing with internet banking) or specialist financial services assistance. It covers both providing assistance and arranging for other specialists to assist the caller should this prove necessary. You will need to use appropriate questions to collect information and maintain confidentiality of information when this is required.

FSPFCS01

Provide callers with specialised assistance in a financial services environment

Performance criteria

You must be able to:

- P1 Follow your organisation's procedures to confirm the caller's perceptions of the specialist assistance they are seeking
- P2 Assess the information provided by the caller in sufficient detail to decide the most appropriate action to take
- P3 Inform the caller of possible actions and their implications where there are a range of these
- P4 Agree with the caller the nature and extent of specialist assistance required to meet their needs
- P5 Provide specialist assistance which is appropriate to the caller's needs and within your authority and knowledge
- P6 Direct callers to the relevant person for further assistance when specialist assistance required does not meet their needs
- P7 Contact the relevant person to establish the next step when specialist assistance required is outside your knowledge or authority
- P8 Take further action through implementing approved procedures where problems are encountered in providing the assistance required
- P9 Record the information gathered and the assistance offered accurately and in full, in line with your organisation's procedures
- P10 Comply with legal requirements, industry regulations, including ethical standards and health and safety organisational policies and professional codes

FSPFCS01

Provide callers with specialised assistance in a financial services environment

Knowledge and understanding

You need to know and understand:

- K1 The use of open and closed questions and the methods of obtaining information from different clients
- K2 How to assess how much information is required before effective assistance can be provided
- K3 How to analyse and prioritise the information provided by callers so that their financial services needs may be met
- K4 Typical types of assistance offered by your organisation and sought by callers
- K5 The importance of listening skills when dealing with calls from others
- K6 How to adapt and use effective methods of communication to help your caller's understanding
- K7 Your levels of responsibility, and to whom to refer when such levels are exceeded
- K8 The importance of time management, and how to use this effectively in balancing the needs of callers with those of your organisation
- K9 Your organisation's call handling standards relating to the quality of calls and the service provided
- K10 Your organisation's requirements relating to the application of codes, laws and regulatory requirements, including ethical standards and health and safety as they impact on your activities

FSPFCS01

Provide callers with specialised assistance in a financial services environment

Additional Information

Behaviours

1. You deal with callers in a manner and at a pace to suit the needs of the caller
2. You present information clearly, concisely, accurately and in ways that promote understanding
3. You demonstrate a clear understanding of different customers and their real and perceived needs
4. You use appropriate listening skills when dealing with callers

FSPFCS01

Provide callers with specialised assistance in a financial services environment

Developed by Financial Skills Partnership

Version number 1

Date approved September 2012

Indicative review date September 2015

Validity Current

Status Original

Originating organisation Financial Skills Partnership

Original URN FSPFCS01

Relevant occupations Finance

Suite Financial Services Customer Care

Key words Communication; authority; policy; procedure; regulation; regulatory; time management; call; caller

FSPFCS02

Deal with customers by telephone in a financial services environment



Overview

This unit is about the skills and competences you need when dealing with your customer by telephone in a financial services environment. Customer satisfaction depends on the way the call is handled as well as the features and benefits of the financial services products or services discussed. In financial services, it is particularly important for customers to feel confident that the information they receive by telephone is accurate and complete. Whilst verbal communication is important, your focus on your customer and the rapport that is formed also depends on your skills with the telephone system and any information you are accessing whilst on the telephone to your customer.

FSPFCS02

Deal with customers by telephone in a financial services environment

Performance criteria

- You must be able to:*
- P1 Operate the telephone and supporting equipment efficiently and effectively
 - P2 Greet your customer following your organisation's guidelines
 - P3 Open the conversation positively and establish a rapport with your customer
 - P4 Establish the purpose of the call as early in the conversation as possible
 - P5 Inform your customer if you need to put them on hold to access information
 - P6 Adapt your style of communication to meet the needs of your customer and the circumstances of the call
 - P7 Follow your organisations guidelines when dealing with abusive callers
 - P8 Manage the length of the call cost-effectively for the customer and your organisation
 - P9 Respond positively to queries and/or objections from your customer about financial services products and/or services
 - P10 Listen carefully when collecting information from your customer so that you do not make mistakes or have to repeat questions
 - P11 Ensure you cannot be heard by your customer when discussing their needs with others
 - P12 Identify the options for meeting your customers needs for financial services products and/or services
 - P13 Choose the option that is most likely to lead to customer satisfaction with the organisation's financial services products and/or services
 - P14 Summarise the outcome of the call and any actions required following the call
 - P15 Record the relevant information following your organisation's guidelines
 - P16 Comply with legal requirements, including ethical standards and health and safety and industry regulations

FSPFCS02

Deal with customers by telephone in a financial services environment

Knowledge and understanding

You need to know and understand:

- K1 How to operate the organisation's telephone and supporting equipment
- K2 Your organisation's guidelines and procedures for the use of telephone and supporting equipment
- K3 The importance of speaking clearly when dealing with customers by telephone
- K4 The effects of facial expressions that can be detected by other parties on the telephone
- K5 The importance of adapting your speech to meet the needs of customers who may find your language or accent hard to understand
- K6 The importance of keeping your customer informed if they are on hold during a call
- K7 The importance of not talking over an open telephone
- K8 How to adapt and use effective methods of communication to help your caller's understanding
- K9 Your levels of responsibility, and to whom to refer when such levels are exceeded
- K10 The importance of time management, and how to use it effectively when balancing the needs of callers with those of your organisation
- K11 Your organisation's call handling standards relating to the quality of calls and the service provided
- K12 Your organisation's guidelines for handling abusive calls
- K13 Your organisation's requirements relating to the application of codes, laws and regulatory requirements, including ethical standards and health and safety as they impact on your activities

FSPFCS02

Deal with customers by telephone in a financial services environment

Additional Information

Behaviours

1. You operate telephone and supporting equipment efficiently and effectively
2. You convey information clearly and concisely
3. You show respect for others in your dealings with them
4. You make information available to those who need it and who have a right to it
5. You use communication styles that are appropriate to different people and situations

FSPFCS02

Deal with customers by telephone in a financial services environment

Developed by	Financial Skills Partnership
Version number	1
Date approved	September 2012
Indicative review date	September 2015
Validity	Current
Status	Original
Originating organisation	Financial Skills Partnership
Original URN	FSPFCS02
Relevant occupations	Finance
Suite	Financial Services Customer Care
Key words	Communication; authority; policy; procedure; regulation; regulatory; time management; call; caller