



# Customer Service

National Occupational Standards (NOS)

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## Overview

This standard is part of the customer service competence area related to Customer Service Foundations. It covers dealing with customers. It includes the language and concepts of customer service as well as the organisational context and the external environment in which you work. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

When working as a customer service professional, you influence how customers feel about the transaction in the way you look and behave to increase their satisfaction levels. Whilst verbal communication is important, your relationship also depends on the non-verbal communication that takes place. You also communicate in writing or electronically in a way that creates a permanent record. This form of communication carries risks and implications that are less likely to apply to verbal communication. You also interact with customers through social media platforms or web portals. Internet-based communication channels have led to customers using online communication with organisations and customers form expectations from how your organisation presents itself and the way it responds to existing and potential customers. Expectations are also affected by other customers and influencers. The reputation of your organisation can be directly affected by social media interactions and the way you deal with negative reactions and problems in the public arena.

This standard is for customer service professionals who deal with customers face to face, or online using written or electronic communication and through social media platforms or web portals to meet their expectations.

## Performance criteria

*You must be able to:*

1. prepare for your conversations with customers
2. explain your products or services, anticipating customer requests and information needs
3. adapt your communication style to meet the individual needs your customers
4. manage your communication environment so that your customers' focus is not interrupted by colleagues
5. observe, listen and focus on your customers to read non-verbal clues about their needs and expectations
6. intervene when one customer is adversely affecting the service of other customers
7. identify the methods customers are using to contact your organisation
8. assess the options for responding to customers and the benefits and drawbacks of each option
9. choose the option that is most likely to lead to customer satisfaction
10. plan your communication objectives and gather the information that you need to respond
11. open the communication positively to establish rapport with customers
12. respond to customer communications in writing using a format, style and tone that reflects your organisation's guidelines and service level agreements (SLAs)
13. adapt your spoken, written or body language to meet the individual needs of customers
14. predict customer expectations taking account of any previous exchanges with them
15. summarise the key points from communications and any actions agreed
16. scan social media or web portals' exchanges to identify customer questions, requests and other communications to respond to
17. respond to direct queries or requests through social media or web portals' communications following organisational guidelines and service level agreements (SLAs)
18. explain your products or services to customers and adapt your response to meet their needs
19. anticipate your customers' requests and needs for information

20. maintain a professional and respectful image when dealing with your customer
21. interpret customers' feelings from the tone of their postings and respond empathetically
22. use direct and effective questions to clarify customers' requests
23. provide information in response to customers' questions and requests
24. check the security settings of social media platforms or web portals when responding privately to your customers
25. confirm that no further responses are expected by your customers when closing contact
26. take opportunities to impress social media community members by seeing how you deal with customers
27. follow the legal, organisational codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. the importance of active listening to understand what your customers are saying
2. your organisation's procedures and service level agreements (SLAs) that impact on how you deal with customers face to face or online
3. the features and benefits of your organisation's products or services
4. the body language principles that help you to interpret customers' feelings without verbal communication
5. the range of behaviour methods and techniques for communication with customers
6. why the expectations and behaviours of individual customers demand different responses to create rapport and achieve customer satisfaction
7. the agreed and recognised signs in customer behaviours that indicate that your customer expects a particular action by you
8. the importance of using a spoken, written or body language that reflects your organisation's style when communicating with customers
9. the additional significance and potential risks involved in committing a communication to a permanent record format
10. the potential impact of different styles on readers of a written or electronic communication
11. the importance of adapting your language to meet the needs of customers who may find written communication hard to understand
12. your organisation's guidelines and procedures and service level agreements (SLAs) relating to written and electronic communication
13. how to operate equipment used for producing and sending written or electronic communications
14. the importance of keeping your customers informed if there is a delay in responding them within service level agreements (SLAs)
15. the risks associated with the confidentiality of written or electronic communications
16. your organisation's conventions and accepted practices for the channel or electronic platform you are using

17. your organisation's guidelines and service level agreements (SLAs) for dealing with customers through social media platforms or web portals
18. the ways that your organisation communicates information to social media communities
19. how to search social media for customers postings related to your organisation
20. how to anticipate your customer's requests and needs when using social media platforms or web portals
21. the importance of interpreting customers feelings and perceptions from postings on social media platforms or web portals
22. the conventions of the social media platforms or web portals that your customers choose to use and how to align with these
23. the importance of sending concise messages when using social media platforms or web portals
24. how to control access to exchanges with customers using social media security settings
25. how to collaborate with colleagues if more than one of you become involved in a customer exchange when using social media platforms or web portals
26. how to recognise the closing step in a series of social media exchanges with a customer
27. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out



## Deal with customers

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| <b>Original URN</b> | CFACSA10, CFACSA13, CFACSA19 |
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| <b>Relevant Occupations</b> | Customer Service Occupations |
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| <b>Suite</b> | Customer Service |
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| <b>Keywords</b> | face to face; satisfaction; relationships; impression formation; customer service; communication; problem solving; work with others; team working; writing; letters; emails; records; contact centres; social media; searches; social media platforms; |
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## Overview

This standard is part of the customer service competence area related to Customer Service Foundations. It covers managing communications in a customer service environment. It includes the language and concepts of customer service as well as the organisational context and the external environment in which you work. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers. You communicate with customers and colleagues using language and concepts that they can understand. You provide customer service in your organisation and contribute to meeting your organisation's requirements. You can describe and explain the products or services that your organisation offers and how it delivers customer service. This means that you use the right language and understand why an organisation needs to balance customer needs with what the organisation is willing and able to provide. Everybody involved in customer service needs to know the customer service content of their job. To provide customer service you also need to understand what your customers want and how they feel. This means that you share information with them and listen carefully to them. Your customers need to understand what you are telling them and what you can do for them. Communication is an essential skill for delivering customer service. Your customer service role involves talking to customers face-to-face or by virtual means of communication. These may be by telephone, through social media platforms or web portals.

This standard is for customer service professionals who manage communications that are at the heart of their organisation's customer service, dealing with both customers and colleagues.

## Performance criteria

*You must be able to:*

1. identify your organisation's customer profiles and their expectations
2. discuss and agree customer expectations with colleagues
3. use your organisation's systems, technologies, processes and procedures for communication with customers
4. access the information you need to deliver customer service within your organisation's guidelines and service level agreements (SLAs)
5. confirm your role and responsibilities for delivering customer service
6. summarise your organisation's service and product information for customers
7. identify the options available to respond to your customers and the benefits and drawbacks of each
8. liaise with customers in a respectful and professional manner face-to-face, on the telephone or through virtual means of communication
9. follow communication protocol in accordance with your organisation's guidelines
10. open conversation with customers to establish their rapport
11. confirm the identity of customers following organisational guidelines and relevant data protection legislation
12. respond to customer communications within your organisation's guidelines and time scales
13. use different types of questions to clarify your customers' needs or requirements
14. check that you understand customers' needs or requirements
15. communicate your actions when accessing information to provide customer responses
16. provide information to customers in response to their questions or requests
17. summarise the outcome of your contact with customers and any actions to be taken
18. check that customer needs have been met during contact and that all their questions or requests have been dealt with
19. update customer records during or after contact to reflect the key points of conversations
20. take messages for colleagues when you are unable to deal with

- customers questions or requests
21. maintain communication with colleagues to provide customer service
  22. summarise customer information for colleagues when dealing with situations outside your level of authority
  23. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. your organisation's customer profiles and their expectations
2. the differences between internal and external customers
3. why organisational procedures and teamwork are important for providing customer service
4. your organisation's systems, technologies and procedures for communication with customers
5. how to find information about your organisation's products and services to support customers' needs
6. the relationship between customer expectations and customer satisfaction and how to meet their needs
7. the products and services offered by your organisation and your role in delivering customer service related to these
8. the importance of customer service and the different roles and responsibilities for delivering customer service in your organisation
9. the communication protocol in accordance with your organisation's guidelines
10. how to open conversation with your customers to establish their rapport
11. how to establish the customer identity in accordance with organisational guidelines and relevant data protection legislation
12. the kinds of information you need to give for good customer service
13. the types of questions to clarify your customers' needs or requirements
14. how to check your understanding your customers' needs and requirements
15. how to use different types of questions to check your understanding about what customers are telling you
16. how to summarise information for customers
17. why it is important to use words your customers understand and the difference between negative and positive language
18. how to talk with customers face-to-face, on the telephone or through virtual means of communication
19. the outcome of your contact with customers and any actions to follow
20. how your communication style affects the way your customer

experiences your customer service

21. how to update customer records during or after contact to reflect the key points of conversations
22. what information is helpful to pass on in messages to colleagues
23. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Manage communications in a customer service environment

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**Status** Original

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**Originating Organisation** Instructus

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**Original URN** CFACSF1, CFACSA3

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** customer service; language; communication; work with colleagues; follow procedures; give information; types of customer; company procedures; services and products; answer questions; internal customer; external customer; teamwork; problem solving;

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## Overview

This standard is part of the customer service competence area related to Customer Service Foundations. It covers processing information about customers. It includes the language and concepts of customer service as well as the organisational context and the external environment in which you work. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

You and your organisation process information about your customers and their behaviour to answer customer questions and to respond to customer requests. Information about customers is also used by your organisation to develop its customer service. Some customer information is collected from your customers whereas other information is collected through information systems and equipment that make records of service delivery. In either case you collect information, retrieve it and supply it when needed to provide a sound basis for all customer service transactions. The quality of the customer information depends heavily on your skills and attention to detail when processing it.

This standard is for customer service professionals who process information about customers.



## Performance criteria

*You must be able to:*

1. collect and record new information about customers in accordance with your organisation's guidelines
2. record new information about customers in your organisation's systems
3. update existing information about customers
4. record information about customers following organisational guidelines for accuracy, sufficiency and relevance
5. respond to authorised requests for information about customers from colleagues
6. select relevant information for customers following your organisation's guidelines
7. select information for colleagues that matches their requests
8. supply accurate and sufficient information about customers to meet your customers' or colleagues' expectations
9. seek support from colleagues when you are unable to access the information you require
10. choose how to supply information to your customers or colleagues using the systems available
11. confirm that your customers and colleagues have received and understood the requested information
12. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. your organisation's procedures and guidelines for collecting, retrieving and supplying information about customers
2. the types of personal information about customers that should or should not be kept on record
3. how to collect and validate information about customers in accordance with data protection legislation
4. how to operate your organisation's customer information storage system
5. the colleagues involved in data processing in your organisation and their roles and responsibilities in relation to you
6. the ways that processing information about customers correctly contributes to customer service
7. the importance of attention to detail when processing information about customers and how to conduct quality checks
8. how to store and use customer data
9. the procedures to follow if you make errors in data and what to do if you, or a colleague, breaches data protection regulations
10. how information should be managed and removed from your organisation's records, when required
11. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Process information about customers

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** customer service; communication; work with others; team working; gather information; answer questions; respond to requests; collect information; retrieve information; supply information

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## Overview

This standard is part of the customer service competence area related to Customer Service Foundations. It covers developing customer relationships. It includes the language and concepts of customer service as well as the organisational context and the external environment in which you work. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

You deal with your customers regularly, aiming to make each occasion a good customer experience. The impression you create and the way the service is delivered affects this in just the same way as when you deal with a customer only once. However, a longer-term relationship with a repeat customer also depends on you building up your customer's confidence in the service you offer. Loyalty and a long-term relationship rely on your customers having a realistic view of your organisation's products and services. Your customer will return to your organisation if they feel confident that they will receive a high standard of service because they have experienced it previously.

This standard is for customer service professionals who develop customer relationships to provide high standards of customer service.

## Performance criteria

*You must be able to:*

1. explain your organisation's products and services to customers
2. communicate with your customers to build and maintain their confidence in your organisation's products and services
3. estimate the time you require to deal with customers to meet their needs and expectations
4. reassure customers that you are doing everything possible to keep your organisation's promises to them
5. identify conflicts between customer expectations and your organisation's products and services
6. explain the limits of the products and services your organisation offers to customers
7. manage customer expectations by offering an alternative product or service when required
8. resolve any difficulties in meeting customer expectations
9. refer any difficulties that you cannot resolve, or are outside your level of authority, to colleagues
10. give additional help and information to customers to respond to their questions and comments about your organisation's services or products
11. discuss customers' expectations with them and explain how these compare with your organisation's products and services
12. share feedback received from your customers with colleagues
13. identify new ways of helping your customers based on the feedback they have given you
14. identify added value that your organisation could offer to long-term customers
15. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. how to access up-to-date information about your organisation's products and services and build your knowledge of these
2. the importance of customer retention for your organisation
3. how your own behaviour affects the behaviour of customers and their expectations
4. how to create a positive impression of your organisation, in line with its culture and values
5. the benefits of using proactive methods of customer service and when these may be required when dealing with customers
6. how to recognise and defuse potentially stressful situations for yourself and your colleagues
7. the limitations of your organisation's services and products in meeting customer needs
8. the types of difficulties that arise when trying to meet customers' expectations and how to resolve them
9. how customer expectations may change as they deal with your organisation
10. the cost and resource implications of extending products and services offered to meet or exceed customer expectations
11. the costs of bringing in new customers compared to retaining existing customers
12. who to refer to when considering any variation to your organisation's products and services
13. how to develop customer relationships using different communication channels such as social media
14. the ways that you can offer added value to long-term customers
15. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Develop customer relationships

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**Original URN** CFACSD1

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** customer service; contact centres; improve; develop; communication; problem solving; work with others; giving information; teamwork; receiving information services; products

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## Overview

This standard is part of the customer service competence area related to Customer Service Foundations. It covers maintaining a healthy and safe environment for customers and colleagues. It includes the language and concepts of customer service as well as the organisational context and the external environment in which you work. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Health and safety are important in all areas of work whether it is office or home-based, and customer service is no exception. You provide high levels of customer service, recognising that it is also important to provide an environment that enables and encourages staff to work safely for themselves and for customers.

This standard is about maintaining a healthy and safe working environment for customers and colleagues.



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## Performance criteria

*You must be able to:*

1. identify health and safety hazards in home-working and your organisation's office environment
2. assess the risks associated with identified hazards
3. identify health and safety factors that may reduce the effectiveness of customer service staff
4. identify health and safety factors that may cause concern to customers
5. evaluate the identified health and safety factors against your organisation's policies and procedures and customer expectations
6. provide information about risks and hazards to colleagues responsible for health and safety
7. provide information on health and safety in the workplace to customer service staff
8. confirm staff responsibilities for health and safety with them
9. maintain measures to control risks to health and safety that are consistent with organisational policies and procedures
10. check that customers and staff are briefed on measures to control risks to health and safety
11. monitor the use of health and safety control measures to ensure that staff are following them
12. enable staff to identify and report health and safety hazards related to the environments they are working in
13. support staff to manage their work-life balance and mental health
14. use agreed organisational procedures to deal with hazards when they occur
15. review the health and safety aspects of the customer service environment when required by your organisation
16. carry out emergency drills within your area of responsibility
17. follow organisational procedures for keeping health and safety records up-to-date and for reporting health and safety incidents
18. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. the importance of maintaining a healthy, safe and effective work at home or in an office-based environment
2. your role and responsibilities for health and safety in the workplace
3. the colleagues who have specific responsibilities for health and safety in your workplace and how they can support you
4. the importance of all colleagues taking responsibility for health and safety in the customer service environment
5. the potential concerns that customers may have about health and safety and how to deal with these
6. how to access up-to-date information on legal and regulatory requirements for health and safety and relevant codes of practice
7. the ways that information about health and safety is shared in your organisation so that all staff are up to date
8. the types of health and safety hazards that are likely to occur in your area of responsibility
9. how to assess the risks associated with health and safety hazards
10. the different types of factors that affect health and safety and how to evaluate them, e.g. people, equipment, material, environment, and processes
11. the health and safety issues that may arise due to staff working from home working?
12. the ways that you and your organisation can support staff to manage their work life balance, remote collaboration practices, mental health and physical health in home and on-site working environments
13. how to carry emergency drills in your customer service environment and when to do this
14. how to control risks in a way that is consistent with legal and regulatory requirements and codes of practice
15. your organisation's policies and procedures for health and safety
16. the recording and reporting procedures within your organisation that are relevant to maintaining a healthy and safe environment
17. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

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| <b>Relevant Occupations</b> | Customer Service Occupations |
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| <b>Suite</b> | Customer Service |
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|-----------------|---|
| <b>Keywords</b> | Health; safety; environment; delivery; customer service; risks; hazards; emergency; drills; codes of practice; customer service; communication; problem solving; behaviours; work with others; team work; giving information; receiving information |
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## Overview

This standard is part of the customer service competence area related to Customer Service Foundations. It covers providing customer support online. It includes the language and concepts of customer service as well as the organisational context and the external environment in which you work. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Many organisations develop their customer service by directing customers towards online services. Customer service delivered online sometimes leaves a customer isolated and reliant on screen routes and instructions. A customer may seek help face to face, telephone or by online means of communication. You understand what your customers are trying to achieve, how the system allows for that and what point they have reached in finding the right route, then help them meet their needs. Difficulties can arise if the online system fails or if the customers are unable to complete what they want. Organisations may also direct customers towards self-service portals which are operated by the customer. Regular customers become familiar with how technologies operate on these portals and may feel uncomfortable about being offered help. Others may be using the technologies for the first time or may be experiencing problems. Sometimes technologies fail and authorised intervention is required to clear it. You recognise the types of help and intervention that are required and provide them to meet customer needs and build their confidence in using the technologies. This standard is for customer service professionals who provide customer support online.

## Performance criteria

*You must be able to:*

1. keep up to date with the online services that your customers use
2. use active listening to establish what your customers are trying to achieve when using online services
3. identify what your customers are having difficulties with
4. question your customers to establish their familiarity with the online services
5. identify customer problems with online services and agree the steps to overcome them
6. instruct customers through online screen sequences, encouraging them to operate the system for themselves
7. support your customers by explaining why certain steps are required in the process
8. offer to take your customer through the process or complete the transaction yourself
9. promote additional services or products when supporting customers with online services
10. prepare to demonstrate using self-service technologies and answer frequently asked questions about it
11. observe customers using self-service technology in line with your organisation's requirements
12. demonstrate how to use self-service technologies
13. identify when customers are having difficulties with self-service technologies
14. respond to requests for help from customers using self-service technologies
15. access staff override options to clear self-service technologies for use by customers
16. instruct customers in using the self-service technologies whilst allowing them to operate it and practice steps
17. make positive and encouraging comments to customers when they are learning to use the self-service technologies
18. troubleshoot problems with self-service technologies, reporting errors and issues to colleagues and decision makers
19. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. how your organisation's system for online service delivery works and the importance of developing your knowledge and skills related to using it
2. the importance of using active listening to discover what your customer is trying to achieve
3. the ways to communicate with customers who have different levels of skills and understanding of the online system
4. the reasons for encouraging customers to complete transactions themselves
5. the importance of building customer confidence in using the online system by supporting them to learn
6. the benefits and drawbacks of talking customers through using the system compared to completing the transaction yourself
7. the additional services or products that may be promoted to online customers
8. the reasons why your organisation offers customers self-service technologies
9. the importance of observing customers using self-service technologies and how to do this
10. how to operate the self-service technologies from a customer and staff perspective
11. the frequently asked questions about using self-service technologies and the answers that should be provided
12. the techniques for demonstrating the self-service technologies to a customer
13. the signals and signs that indicate that a customer needs help with self-service technologies
14. the organisational procedures for using staff intervention to clear self-service technologies
15. the importance of building customer confidence in using self-service technologies
16. the organisational procedures for dealing with self-service technologies' problems
17. the colleagues who can help you with self-service technologies problems
18. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Provide customer support online

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**Original URN** CFACSD4, CFACSD7

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** face to face; telephone; system failure; development; improvement; online; customer service; contact centres; improve; develop; communication; problem solving; teamwork; information; self-service technologies; customer experience

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## Overview

This standard is part of the customer service competence area related to Customer Service Foundations. It covers developing your own, and colleagues' customer service skills. It includes the language and concepts of customer service as well as the organisational context and the external environment in which you work. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers. You take responsibility for continuously developing your own customer service skills. You take responsibility for developing customer service knowledge and skills using different sources of information and you seek feedback from your supervisor or senior manager.

This standard is about developing your own customer service skills by working alongside your colleague and providing constructive feedback.



## Performance criteria

*You must be able to:*

1. identify the specific customer service knowledge and skills you need in your customer service role
2. agree actions to improve your customer service knowledge and skills with your manager or mentor
3. create a personal development plan based on agreed actions
4. carry out your personal development activities and review your progress on a regular basis
5. obtain feedback from your manager or mentor about your performance and update your personal development plan
6. identify different sources of information and support that will help you to develop your customer service knowledge and skills
7. access information to support your development and store self-study materials for future use
8. review the self-study materials you have collected and update your personal development plan
9. access organisational update information to increase your knowledge of services or products and how your role contributes to customer service
10. monitor publications to identify ideas or new developments in customer service which you could apply in your work
11. change the way you deal with customers because of what you have learned
12. share your personal development plan with your line manager, your mentor or customer service colleagues to seek their ideas for further activities
13. record what you have learned about customer service and identify the actions that have the most positive impact
14. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. how to source and access information about your organisation's services or products
2. the sources of information about customer service knowledge and skills that will help you to develop
3. the organisational systems and procedures for developing your own and others' personal performance in customer service
4. how your behaviour impacts on others and their development
5. how to review your personal strengths and development needs
6. how to create a personal development plan for yourself and colleagues that will build on strengths and overcome weaknesses in customer service performance
7. how to obtain useful and constructive personal feedback from others
8. how to respond positively to personal feedback and take action to learn from it
9. how to put together a coaching plan that will build on colleagues strengths and overcome their weaknesses related to customer service and their job roles
10. how to give constructive personal feedback to others
11. how to help colleagues to respond positively to personal feedback
12. how to store information that you use to develop your customer service skills
13. the importance of focus when self-studying to improve your customer service knowledge and skills
14. the ways you can convert information or ideas you have found through self-study into practical customer service actions at work
15. the value of discussing your learning with your line manager, mentor or colleagues doing a similar job
16. the methods for recording actions to improve your customer service skills
17. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Develop your own customer service skills

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** developing skills; continuous development; improvement; coaching; demonstrating; customer service; problem solving; behaviours; work with others; team working; giving information; receiving information; constructive feedback

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## Overview

This standard is part of the customer service competence area related to Impression and Image. It covers providing customer focused service. It includes area that covers the customer service behaviours and processes that have most impact on the way your customer sees you and your organisation. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Professional customer service is provided by people who are good with people. Your behaviour affects the impression that customers have of the service they are receiving. You give a positive impression whenever you deal with customers which reflects on your organisation and the customer service it provides. You create the right first impression, respond to customers' requests, and give them information to meet their needs. Some of your customers expect different things from the service you offer but there are organisational standards of behaviour and attitudes that you need to achieve. When you create the right impression and show a positive attitude you reduce the risk of somebody being upset or dissatisfied with your organisation.

This standard is for customer service professionals who provide customer focused service following their organisation's requirements.

## Performance criteria

### *You must be able to:*

1. provide a professional impression to customers following your organisation's guidelines
2. greet your customer using your organisation's guidelines and style
3. follow your organisation's dress code to present the required professional image to your customers
4. identify and confirm customers' expectations
5. check that you have fully understood customers' expectations
6. maintain communications to keep your customers informed and reassured
7. select communication styles that meet your customers' needs, using words that they can understand
8. adapt your behaviour to respond to different customer behaviours
9. complete your work tasks to meet your customers' expectations based on what your organisation offers
10. identify and respond to customer needs and individual expectations
11. allow your customers time to consider your responses and give further explanation when appropriate
12. share information with customers about how delivery of the service or product is going
13. recognise information that your customer might find complicated and check whether they understand it
14. provide flexibility to help individual customers without reducing the level of service you give to others
15. share information with colleagues to provide customer service
16. respond to customers seeking help within service level agreements (SLAs)
17. recognise how customers are feeling to establish a rapport with them and see their perspectives
18. demonstrate enthusiasm for services and products to customers
19. focus on your customers and ignore distractions when providing service to them
20. interrupt your work with your customer when necessary, following your organisations guidelines
21. explain the reasons why expectations cannot be met to customers when required
22. demonstrate that you are exceeding basic service levels to impress customers when required

23. give thanks to customers for the information they have given and for using your organisation
24. support colleagues to provide customer focused service in line with your organisation's requirements
25. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. your organisation's standards for providing customer service
2. the difference between customer centric service and customer focused service and the activities that relate to these
3. your organisation's dress code and this impact this has on making a professional impression on customers
4. how to complete the customer service tasks related to your job, including the time required to complete different tasks and how this may affect your customers
5. how to complete your own work activities in an organised way
6. what your customers expect of you and your work
7. the methods and style of communication that your organisation uses when dealing with customers
8. how to recognise when a customer is angry or confused and adapt your behaviour to meet their needs
9. how to access information about your organisation's services and products to provide this to customers to meet their needs
10. the ways that you can identify if customers have understood the information you have provided and how to adapt your approaches
11. the limits of your organisation's services and products and how to explain these to customers when their expectations have not been met
12. the importance of balancing the needs of one customer with the needs of other customers
13. how to do your job in a way that is healthy and safe for you, your customers and your colleagues
14. the signs that a customer gives when seeking attention from you
15. the importance of building rapport with customers and the related practices that can be used to build and maintain rapport
16. the importance of timekeeping and making sure you are where you are expected to be to give customer service
17. the behaviours that most customers see as "good manners" and what they may consider to be "bad manners" or rudeness
18. the ways of communicating with your customers and how to select the method that best meets customers' needs e.g. face to face, by telephone, text, e-mail, in writing or other social media
19. the types of language your customers and colleagues might consider to be unsuitable and why it may be offensive

20. the impact that a friendly attitude has on customers impressions of you, and of your organisation
21. how to use a friendly attitude with customers without being over-familiar
22. the reasons for interrupting your work with customers
23. the different types of positive and negative body language and facial expressions
24. the individual differences that customers may have and how to meet their different expectations based on aspects such as their age, culture and personality
25. how to support and collaborate with colleagues to deliver customer service
26. the reasons why you may need to interrupt your work with customers and how to do this in a way that minimises impact on customers
27. your organisation's guidelines for thanking customers for information provided and for using your organisation's services and products
28. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out



Provide customer focused service

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**Original URN** CFACSA1, CFACSA2, CFACSA4, CFACSB1

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** customer trust; champion; customer service; decision making; listening; customer satisfaction; friendly; positive; personal attention focus; work with others; communication; body language; culture

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## Overview

This standard is part of the customer service competence area related to Impression and Image. It covers providing customer-centric service. It includes area that covers the customer service behaviours and processes that have most impact on the way your customer sees you and your organisation. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

You often deal with many customers who seem to be the same, but recognise that each customer is an individual. You make each customer feel that they have had your complete attention and have been dealt with personally to increase their sense of satisfaction. When your customer feels that you have taken special care to give them good service and have done something more than they expect, they are likely to enjoy a better customer service experience. Opportunities to add this extra value to your customer's experience depend on you spotting what they will particularly appreciate. Often you can offer this little extra when sorting out a difficulty or problem. Whatever special service you give when you "go the extra mile" must be within your own authority or with the authority of an senior colleague. You must also take account of the organisation's procedures and regulations. When you work with customers you make them feel that you care what happens to them and that you respect them as individuals.

This standard is for customer service professionals who provide customer centric service.

## Performance criteria

### *You must be able to:*

1. identify when you can add a personal touch to your customer service within your organisation's systems or procedures
2. observe and listen to your customers for signs that will help you personalise their service
3. confirm that you understand customer needs and are there to help them
4. identify opportunities to help or direct your customer outside of your routines and procedures
5. identify customers with individual needs who would appreciate a more personalised service
6. balance the time you take to give individual attention to one customer with the needs and expectations of other customers
7. communicate with customers following organisational guidelines to show respect for them as individuals
8. focus your attention on the customers you are dealing with
9. follow your organisation's guidelines for giving your customer your own name and contact details
10. build a 'one to one' relationship with your customer using organisational guidelines
11. treat customers as individuals recognising that each customer is unique
12. demonstrate respect to customers and colleagues at all times and avoid over-familiarity
13. explain your organisation's products and services
14. identify your customers' expectations and needs
15. match products and services with customers' expectations and needs
16. identify other actions that could give added value to your customer service and choose those that will impress your customers
17. check that added value actions fit within your organisation's guidelines and external regulations
18. explain your actions for added value service to a senior colleague for their authorisation when required
19. implement agreed actions to add value in customer service
20. communicate the added value of your actions with customers
21. monitor the effects of your added value actions to check that other customers are unaffected

22. monitor feedback from your customers about the impact of your actions
23. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. the principles of customer centric service and the activities relating to it
2. when and how to use your customer's name, your name and contact details following organisational guidelines
3. the different personalities that customers have and their receptiveness to personalised services
4. the types of personal information about customers kept on record
5. the types and features of customer service you can offer to customers with individual needs
6. how to use open body language and approaches to communication that align with your organisation's culture, values and requirements
7. your organisation's guidelines on actions that are permissible outside of the normal routines and procedures
8. your own preferences and comfort levels relating to how you are willing and able to provide customer-centric service
9. the boundaries beyond which customer service may be perceived as inappropriate by your organisation
10. how to identify the unique requirements that individual customers have
11. the importance of adapting approaches to customer service delivery to show respect to customers and colleagues and the potential consequences of over-familiarity
12. how to gain information about a customer's preferences, including through social media
13. your organisation's services and products and how to match these to customer needs and expectations
14. how to evaluate customers' expectations of the service they will receive
15. the types of service actions that customers see as adding value to customer service
16. your organisation's rules and procedures that determine your authority to 'go the extra mile'
17. how your organisation receives customer service feedback about their customer experience
18. your organisation's procedures for making changes in its services and products

19. how to monitor feedback from customers and colleagues about actions taken to exceed customer expectations
20. how to recognise when added value actions become routine and should be accommodated within the standard services and products
21. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Provide customer centric service

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| <b>Originating Organisation</b> | Instructus   |
| <b>Original URN</b>             | CFACSA8, CFACSA9   |
| <b>Relevant Occupations</b>     | Customer Service Occupations   |
| <b>Suite</b>                    | Customer Service   |
| <b>Keywords</b>                 | Communicating; giving respect; personal touch; customer service; communication; problem solving; behaviours; work with others; team working; balancing time; relationship building; feelings; adding value; appreciation |

## Overview

This standard is part of the customer service competence area related to Impression and Image. It covers championing customer service. It includes area that covers the customer service behaviours and processes that have most impact on the way your customer sees you and your organisation. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Staff with high levels of responsibility for customer service have an important role to play as champions of excellent service within their organisations. You promote customer service to service partners that support your organisation to deliver reliable customer service. You also have extensive expertise that can benefit colleagues and partners.

This standard is for customer service professionals who champion customer service by being constantly alert for issues that affect customer service, analysing these issues and their implications, challenging on behalf of the customer and passing on your expertise to others.



## Performance criteria

*You must be able to:*

1. identify the role of customer service within your organisation's strategic and business plans
2. monitor developments in your organisation to identify those important to customer service delivery
3. support the analysis of customer service developments in your organisation
4. challenge customer service developments from the customer's standpoint
5. influence colleagues and decision-makers to ensure that developments improve customer service
6. role model how to provide customer service following your organisation's guidelines
7. respond to requests for customer service advice or information from colleagues and partners
8. carry out research to enhance or verify communication with customers
9. communicate customer service advice and information within your organisation's guidelines
10. support colleagues and partners to explore the implications of your advice or information for their own work
11. identify actions for colleagues and partners you related to the advice or information explored
12. monitor the actions taken related to advice or information
13. evaluate the results of your advice or information
14. review the way you collect information, formulate advice and communicate it to colleagues and partners
15. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. your organisation's strategic and business plans related to customer service delivery
2. your role and responsibilities related to championing customer service delivery, including your limits of authority
3. the processes for decision making within your organisation and who is involved
4. how to monitor customer service developments within your organisation
5. how to build relationships and use your influence and authority to affect decision making
6. the types of organisational developments that are likely to affect customer service and how to analyse the implications for customer service
7. the importance of empathising with customers and how to represent their viewpoint in a constructive way
8. how to identify when colleagues and partners need advice and information on customer service issues
9. how to use different types of research to support your advice and information on customer service
10. how to provide advice and information to colleagues and partners
11. the ways that you can monitor the actions taken as a result of your advice and information
12. how to evaluate the results of your advice and information to identify improvements
13. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Champion customer service

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** Responsibility; excellent service; service partners; knowledge; champion; analyse; expertise; customer service; communication; problem solving; work with others; team working

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## Overview

This standard is part of the customer service competence area related to Impression and Image. It covers delivering customer service in accordance with equality and diversity. It includes area that covers the customer service behaviours and processes that have most impact on the way your customer sees you and your organisation. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Many customer service situations involve dealing with diverse groups of people inclusively and with respect. Responses to diversity can lead to discrimination that might or might not be deliberate. Discrimination can result from simply not knowing the beliefs and preferences of different groups or may result from actions based on stereotyping rather than on solid evidence obtained from your customer. You establish your customer's expectations and needs in a way that takes full account of them as an individual.

This standard is for customer service professionals who deliver customer service in accordance with equality and diversity.

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## Performance criteria

*You must be able to:*

1. develop self-awareness of your own beliefs about different groups of customers to identify potential bias
2. observe verbal and non-verbal clues to gather information about your customers' expectations and needs
3. identify and avoid stereotypes that might be applied to your customers and could cause offence
4. identify aspects of your customers appearance and communication that could lead you to treat them differently
5. question your customers to check that your understanding of their expectations and needs is based on valid evidence
6. adjust your interpretation of your customer's expectations and needs because of further evidence you have collected by talking to your customer
7. show respect for customers individual beliefs, expectations and needs that may result from their membership of a particular group
8. adapt your approach to customers to take account of their beliefs, expectations and needs that result from their membership of a particular group
9. work with colleagues to agree consistent approaches that team members should adopt to provide inclusive service
10. implement the approaches that your colleagues have agreed to provide inclusive customer service
11. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. the importance of recognising your own potential bias towards customers and how to build your self- awareness of personal biases
2. the reasons why consideration of diversity and inclusion issues affect customer service
3. your organisational guidelines to make customer service inclusive for diverse groups of customers
4. how to observe and interpret non-verbal clues when communicating with customers
5. how to listen actively for clues about your customer's expectations and needs
6. the techniques for obtaining additional information from customers through tactful and respectful questions
7. the behaviour that might cause offence to specific groups of people to whom you regularly provide customer service
8. the ways that you can demonstrate respect for customer's individual beliefs, expectations and needs
9. how to adapt your approaches according to different customer groups
10. the ways that you can create inclusive customer service by working with colleagues
11. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

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| <b>Originating Organisation</b> | Instructus  |
| <b>Original URN</b>             | CFACSB4   |
| <b>Relevant Occupations</b>     | Customer Service Occupations  |
| <b>Suite</b>                    | Customer Service  |
| <b>Keywords</b>                 | Diversity; recognition; discrimination; beliefs; preferences; stereotyping; customer expectations; individual; customer service; communication; problem solving; behaviours; work with others; teamwork |

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## Overview

This standard is part of the customer service competence area related to Impression and Image. It covers delivering brand promise using social media. It includes area that covers the customer service behaviours and processes that have most impact on the way your customer sees you and your organisation. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers. You work in an organisation that has a defined brand and vision which includes a specific promise to your customers that influences what they expect. You achieve customer satisfaction by matching customer expectations to the brand promise. You also have an important role to play as a champion of excellent service. You use social media platforms as a key part of delivering customer service strategy, with responsibility for encouraging the use of these communication channels with customers. This involves having knowledge and expertise both about customer service and about the potential and use of social media. You analyse issues and changes, challenge on behalf of customers and pass on your knowledge and expertise to colleagues. You act as a champion by being constantly alert for issues and opportunities that affect customer service through social media.

This standard is for customer service professionals who deliver brand promise using social media.



## Performance criteria

*You must be able to:*

1. define the key features of your organisation's services and products, vision and brand promise
2. specify the procedures and regulations your organisation follows to support the brand promise
3. devise and use phrases that reinforce the brand promise
4. share ideas with colleagues about how particular words and approaches help support the brand promise
5. identify examples of customer service that relate to your customer's experience of the brand promise being delivered
6. check that your customers believe that the brand promise is being delivered
7. follow your organisation's guidance for appearance and behaviour to support your organisation's brand
8. observe and listen to your customer closely to identify opportunities to reinforce their understanding of the brand promise
9. take actions to deliver customer service that meets your customer's expectations and understanding of the brand promise
10. outline the role of social media within your organisation's customer service strategy and business plans
11. monitor developments in your organisation to identify those related to social media to deliver customer service
12. monitor social media developments to identify those related to customer service delivery
13. analyse the implications of customer service developments in social media for the organisation
14. question and challenge social media use from the customer's standpoint
15. influence colleagues to ensure that developments in use of social media improve customer service
16. promote your ability to provide advice and information on the use of social media in customer service
17. respond to requests for advice and information on the use of social media in customer service
18. carry out research to enhance or verify the advice and information you give
19. provide advice and information on the use of social media in customer service
20. help colleagues to explore the implications of your advice and

Deliver brand promise using social media

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- information for their own work and identify actions
21. evaluate the effects of your advice and information
  22. review how you collect information about social media use, formulate advice and communicate it to others to make improvements
  23. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. the brand promise made by your organisation's promotional materials
2. how brand promise influences the strength of your organisation's brand
3. the key features, moments of truth (those points in the customer service process that have the most impact on the customer experience) and customer experiences that define your organisation's brand
4. the ways that staff can contribute to communicating the brand promise to customers
5. the sales, marketing and public relations' reasons for defining a brand
6. how words can be used and adapted to reflect a brand promise
7. the importance of using words and phrases that reinforce the brand and avoiding those that conflict or undermine it when dealing with customers
8. how a brand promise is affected by social media exchanges
9. how actions can be used and adapted to reflect a brand promise
10. the processes for decision making in your organisation and who is involved
11. how to monitor customer service within your organisation
12. how to monitor social media developments relevant to customer service
13. how to use your influence and authority to affect decision making
14. the types of developments in social media that may affect customer service and how to analyse the implications
15. the importance of empathising with customers and how to represent their viewpoint in a constructive way
16. how to identify when colleagues need advice and information on the use of social media in customer service
17. how to use research to support your advice and information on the use of social media in customer service
18. how to apply your advice and information on the use of social media in customer service
19. how to monitor the effect of your advice and information on the use of social media in customer service
20. the legal, organisational, codes of practice and policies relevant to

your role and the activities being carried out

Deliver brand promise using social media

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** Branding; services; products; customer service; communication; problem solving; behaviours; work with others; team working; promises; social media; customer trust; champion; social media developments

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## Overview

This standard is part of the customer service competence area related to Impression and Image. It covers building a customer service knowledge base. It includes area that covers the customer service behaviours and processes that have most impact on the way your customer sees you and your organisation. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers. Your organisation has a systematic or technology supported approach to building a customer knowledge base. You maintain and improve customer service by using a customer service knowledge base. This knowledge base is built up continuously as your organisation learns from interaction with its customers. Your organisation's knowledge base may contain a wide variety of information about customers and their transactions with the organisation and is drawn from a wide variety of sources. You and your colleagues build and grow the knowledge base as a customer service tool.

This standard is for customer service professionals who build a customer service knowledge base to develop and improve the way their organisation deals with customer transactions.

## Build a customer service knowledge base

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### Performance criteria

*You must be able to:*

1. identify information for inclusion in the knowledge base by actively listening to customers
2. classify information collected during customer interactions for inclusion in the knowledge base
3. identify questions frequently asked by customers for inclusion in the knowledge base
4. identify the broad customer service messages of your organisation's answers to frequently asked questions
5. develop responses to customer queries and requests by working with colleagues
6. contribute ideas and proposed responses to the customer knowledge base which build on key organisational customer service messages
7. monitor the effects of proposed knowledge base responses with customers during live customer service delivery or in trials
8. analyse your organisation's customer service knowledge base to identify trends and patterns
9. access information from the customer service knowledge base using specific search criteria
10. explore the customer service knowledge base to research a topic of interest or project area
11. access the customer service knowledge base to inform the introduction of a new product or service variation
12. use the customer service knowledge base to respond to a specific customer request or query
13. assist colleagues to locate the information they require in the customer service knowledge base
14. add to the customer service knowledge base after dealing with a customer request or query when required
15. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Build a customer service knowledge base

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### Knowledge and understanding

*You need to know and understand:*

1. the structure and content of your organisation's customer service knowledge base
2. how to actively listen to customers to identify the information that they need
3. the input and update processes for adding to your organisation's customer service knowledge base
4. the ways in which information for a customer service knowledge base can be drawn from different sources, including social media platforms
5. the ways that information in a customer service knowledge base can be classified and why this is important
6. the questions frequently asked by customers of your organisation
7. the importance of working with colleagues to develop responses to customer requests and queries
8. the importance of trialling or testing proposed responses to frequently asked questions, and how to do this in your organisation
9. how to analyse your organisation's customer service knowledge base to identify patterns and trends, and how this information is used
10. your organisation's key messages in relation to the services or products you are delivering
11. the ways to interpret information in a customer service knowledge base
12. the techniques for assisting a colleague to locate information in your customer service knowledge base
13. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out



## Build a customer service knowledge base

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| <b>Originating Organisation</b> | Instructus   |
| <b>Original URN</b>             | CFACSA16   |
| <b>Relevant Occupations</b>     | Customer Service Occupations   |
| <b>Suite</b>                    | Customer Service   |
| <b>Keywords</b>                 | improving customer service; knowledge; interaction; colleagues; customer transaction; customer service; communication; problem solving; behaviours; work with others; team working |

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## Overview

This standard is part of the customer service competence area related to Impression and Image. It covers delivering seamless customer service with a team. It includes area that covers the customer service behaviours and processes that have most impact on the way your customer sees you and your organisation. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers. Excellent customer service is a team effort. You win and maintain the loyalty of customers by pulling together with all the other staff who help to organise the delivery of services or products, interface with the customer, or provide back-up to customer service activities. Your team includes colleagues, senior managers and service partners who are working in other departments or outside organisations who contribute to customer service delivery. To achieve your organisation's aims and objectives for customer service you build effective working relationships with all these team members to ensure their co-operation and support. You act as a 'buddy' for colleagues to support their development when required.

This standard is for customer service professionals who deliver seamless customer service with internal or external teams.

## Deliver seamless customer service with a team

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### Performance criteria

*You must be able to:*

1. identify team strategies for delivering seamless customer service with colleagues
2. share information and knowledge to improve customer service
3. encourage, accept and respond positively to feedback from colleagues on customer service performance
4. deal with conflict and resolve it through collaboration with colleagues
5. review teamwork strategies for delivering seamless customer service with colleagues
6. identify the key service partners who support the delivery of seamless customer service
7. agree approaches for delivering seamless customer service with service partners
8. develop and maintain working relationships with service partners
9. ensure that your commitments to service partners are met
10. check that service partners commitments to you are fulfilled as agreed
11. communicate with service partners on issues that affect them and your customers
12. resolve customer service problems by working together with service partners
13. work with service partners to deal with conflict constructively
14. support colleague development by agreeing the specific customer service knowledge and skills they need in their roles
15. identify opportunities and activities for colleagues to develop their customer service skills
16. plan activities and coaching sessions for colleagues to help them develop their customer service skills
17. support colleagues to practise skills, apply knowledge and gain experience to develop their customer service competence
18. check colleagues' progress and modify your coaching methods when required
19. plan and carry out buddy sessions to support your colleagues on the job, ensuring that you do not detract from delivering customer service
20. role model customer service tasks for your buddy colleague to set an example they can follow
21. observe your colleague perform the tasks to identify what they do

- well and the areas of improvement
22. give feedback to your colleague about the work they have carried out well and how they can improve their customer service performance
  23. discuss and agree actions with your buddy colleague to develop their performance
  24. provide tips on effective customer service actions to your buddy colleague based on your own experience
  25. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. the teams and service partners that your organisation works with and the service level agreements (SLAs) in place
2. your role in relation to working with internal colleagues and external service partners
3. how to analyse the contribution and roles of colleagues and service partners when delivering customer service
4. the types of support you that can provide to colleagues and service partners
5. the support that colleagues and service partners can provide to you to deliver seamless customer service
6. the benefits and challenges of collaborative working and what may go wrong
7. how to prepare for working relationship challenges and resolve them to the satisfaction of both parties
8. the value and importance of effective communication with colleagues and service partners
9. the types of behaviours that build and maintain respectful and honest relationships with colleagues and service partners
10. the types of conflicts that arise with customers and how to deal with these constructively following your organisations procedures
11. the tasks in different buddy colleagues' job roles
12. the areas of the customer service job activities that benefit most from buddying support
13. how to select the best times to work alongside your buddy colleagues
14. the ways to work alongside your buddy colleagues without intruding on the customer relationship
15. the techniques for giving feedback and constructive criticism to your buddy colleagues
16. the importance of establishing a rapport with your buddy colleagues
17. the range of actions that your buddy colleagues can take to improve their customer service performance
18. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Deliver seamless customer service with a team

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**Original URN** CFACSB16

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** team work; delivery; maintain loyalty; work with others; team; working relationships; co-operation; collaboration; support

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## Overview

This standard is part of the customer service competence area related to Impression and Image. It covers building and maintaining customer relations. It includes area that covers the customer service behaviours and processes that have most impact on the way your customer sees you and your organisation. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Building and developing customer relations is a vital aspect of customer service. Strong customer relations help your organisation to identify and understand your customers' expectations, encourage a way of working that is based on partnership and mutual trust, and establish and maintain customer loyalty. You may establish and maintain customer relations by encouraging loyalty and repeat business from large numbers of customers. Alternatively, you may nurture a smaller number of valued customers who make an important strategic contribution to your organisation's success.

This standard is for customer service professionals who build and maintain customer relations, influencing the way that their organisation determines the level of service offered to different customers.

## Performance criteria

*You must be able to:*

1. identify the types of customers for building longer term customer relations and loyalty
2. communicate with the identified customer types so that they know they are important to your organisation
3. explain your role, the purpose of making contact and the mutual benefits of building a longer-term relationship with customers
4. welcome two-way communication about customer expectations
5. keep customers informed about your organisation's service and products
6. accept criticism from customers openly and constructively
7. assess whether customer expectations are being consistently met
8. create solutions to maintain and improve customer service relations
9. influence customer service delivery to ensure that you meet customer needs and expectations, and exceed them where possible
10. collect feedback from customers to ensure that the solutions provided result in customer satisfaction
11. collect feedback from colleagues about the impact that solutions have on customer satisfaction and loyalty
12. analyse feedback to propose changes that will develop longer term customer relations and loyalty
13. present your proposed changes to decision-makers in your organisation and agree actions
14. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out



## Knowledge and understanding

*You need to know and understand:*

1. the types of customers that your organisation provides services or products to
2. how to identify and prioritise the types of customers with whom you should build a longer-term relationship based on your organisation's plans
3. the methods that your organisation used to establish longer term relationships with the prioritised customer types
4. your role and responsibilities for building and maintaining customer relations, and the colleagues that you work with
5. the importance of communication skills when dealing with customers and building relationships
6. how to explore and agree the mutual benefits of maintaining and developing a longer-term relationship with customers
7. how to communicate with customers when they are dissatisfied with services or products
8. how to negotiate with customers in a way that balances their expectations with the expectations of your organisation
9. the types of compromises that are acceptable to your organisation when meeting customer expectations
10. how to use your influence and authority in your organisation to meet or exceed customer expectations
11. the methods of monitoring customer satisfaction appropriate to your level of authority in the organisation
12. the part played by internet contact, social media and the potential this offers for building and maintaining customer relations
13. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Build and maintain customer relations

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| <b>Relevant Occupations</b>     | Customer Service Occupations   |
| <b>Suite</b>                    | Customer Service   |
| <b>Keywords</b>                 | customer relationships; building relationships; loyalty; influence; customer service; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information services; products |

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## Overview

This standard is part of the customer service competence area related to Customer Service Delivery. It covers delivering customer service to challenging customers. It includes customer service behaviours and processes that have most impact on the customer experience during Customer Service Delivery. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Many organisations have a significant proportion of customers who are challenging to deal with. Your customer's attitude may be challenging because they believe that a threat or problem exists before they have contacted your organisation. During your interaction with them, they may become worried or angry when they discover that their expectations are not going to be met by your organisation. They may be concerned or nervous about the outcome of dealing with your organisation. In either case, they are challenging to deal with and need your understanding. You deal directly with these customers and try to reach a resolution that satisfies everybody or at least reduces the risk of dissatisfaction. You follow the rules set by your organisation about what you can and cannot do for customers.

This standard is for customer service professionals who deliver customer service to challenging customers.

## Deliver customer service to challenging customers

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### Performance criteria

*You must be able to:*

1. recognise types of challenging customer behaviours
2. identify aspects of your organisation's services or products that may provoke challenging behaviours
3. identify signals that indicate customers may be challenging to deal with
4. consider the situation from your customer points of view
5. identify reasons why your customers may be behaving in a challenging way
6. recognise the limits of challenging customer behaviour that your organisation will tolerate
7. identify triggers that could provoke challenging responses from customers
8. listen to what customers tell you
9. use questions to identify customer feelings and experiences
10. analyse what might satisfy customers with challenging behaviours
11. describe your perspective and the options available to customers
12. express empathy without necessarily admitting your organisation's fault
13. give explanations of your organisation's position
14. agree actions to balance customer satisfaction with your organisation's needs
15. request help from colleagues when the actions are outside your authority
16. record the actions taken to complete customer transactions
17. advise your manager and colleagues when customers are likely to re-open the matter
18. protect the safety and security of yourself, other customers and colleagues when dealing with challenging customer behaviours
19. recognise the limits of your role when delivering customer service
20. refer customers to colleagues in authority when required
21. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Deliver customer service to challenging customers

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### Knowledge and understanding

*You need to know and understand:*

1. the types of customer behaviours that you find challenging to deal with
2. the reasons why some aspects of your organisation's products and services may provoke challenging behaviour from customers
3. the different reasons that customers may behave in a way that is challenging to deal with
4. how to actively listen to customers and clarify that you understand them
5. the types of questions that you can use to identify customers feelings and experiences
6. how to develop and show empathy for customers feelings
7. the colleagues who can help you deal with challenging customers
8. the differences between assertive, aggressive and passive behaviours
9. the importance of not simply quoting your organisation's rules and procedures to counter customers challenging behaviours
10. your organisation's limits of what will be tolerated from challenging customers before the transaction or relationship is closed
11. the importance of giving your manager or colleagues notice of any potential further approaches from challenging customers
12. the situations when it is necessary to protect the safety and security of other customers, colleagues and yourself from challenging customers
13. the limits of your authority when delivering customer service
14. when and how you should refer to colleagues in authority about the rules for delivering customer service
15. the actions you can take to protect the security of customers and their property
16. how you protect customer information securely using your organisation's systems and procedures
17. how to complete and record customer transactions to close your interaction with them
18. your health and safety responsibilities as they relate to your customer service work
19. your role and responsibilities to deliver customer service whilst treating customers equally
20. the importance of respecting customer and organisation

Deliver customer service to challenging customers

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confidentiality

21. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Deliver customer service to challenging customers

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| <b>Relevant Occupations</b>     | Customer Service Occupations  |
| <b>Suite</b>                    | Customer Service  |
| <b>Keywords</b>                 | problem solving; handling problems; difficult behaviours; dissatisfaction; customer service; communication; problem solving; work with others; teamwork; giving information; receiving information services; products |

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## Overview

This standard is part of the customer service competence area related to Customer Service Delivery. It covers delivering customer service in an environmentally friendly and sustainable way. It includes customer service behaviours and processes that have most impact on the customer experience during Customer Service Delivery. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Environmental awareness and positive action on sustainability form an important part of the culture and strategy in your organisation. Your organisation has devised policies to ensure that they gain the approval of customers by promoting a sustainable approach to their services or products to enhance the organisation's reputation. You deliver customer service following guidelines and procedures to display your personal and organisational commitment to the environment, sustainability and environmental standards. Customer service may impact on environmental performance by demanding additional resources. Environmental policies may impact on customer service by placing restrictions on how it can be delivered. You review the link between customer service and environmental issues to identify and make changes. You encourage environmental and sustainability awareness with colleagues, suppliers, customers and other stakeholders to remind them of their responsibilities.

The standard is for customer service professionals who deliver customer service in an environmentally friendly and sustainable way.



## Performance criteria

### *You must be able to:*

1. encourage customers to contribute to your organisation's environmental policies
2. inform customers about your organisation's environmental and sustainability policies
3. promote environmentally friendly and sustainable approaches when dealing with customers and service partners
4. keep customers and service partners informed about your organisation's environmental and sustainability policies
5. identify opportunities for energy and carbon emission savings during customer service delivery
6. identify opportunities for waste management improvements during customer service delivery
7. inform colleagues with authority about the potential improvements you have identified
8. identify how your organisation's policies on customer service link with environmental policies
9. analyse links between your organisation's environmental policies and customer service delivery systems and processes
10. review your organisation's customer service systems to identify opportunities for environmental improvements
11. identify service partnerships that affect your organisation's environmental profile and how they can improve it
12. develop an action plan to promote environmental actions and improvements in customer service delivery
13. encourage colleagues to promote environmentally friendly services and products
14. identify ways to minimise resource use in customer service delivery
15. implement environmental improvements with customers and service colleagues
16. communicate environmental improvements to customers
17. encourage service partners and customers to participate in improvements
18. develop colleague awareness of environmental matters and how they can contribute
19. develop community stakeholders' awareness of your organisation's environmental approaches
20. follow the legal, organisational, codes of practice and policies

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relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. the principles of environmental practices and on-going sustainability that are relevant to customer service operations
2. your organisation's policies that link environmental issues with customer service
3. how to encourage customers to contribute to environmental policies
4. the principles of energy saving and reducing carbon emissions
5. the principles of waste management that are relevant to your organisation
6. the environmental issues and risks represented by your organisation's services or products
7. your organisation's procedures for energy, carbon emission and waste management
8. how to keep customers informed about your organisation's environmental policies and procedures
9. how to work with service partners to promote environmental and sustainable benefits
10. the methods that your organisation uses to encourage colleagues to share ideas for environmental improvements
11. the importance of having appropriate authority for implementing changes in customer service procedures
12. the relationship between environmental actions and costs for your organisation
13. how your organisation's environmental policies link with customer service delivery
14. the techniques for reviewing environmental aspects of customer service systems
15. the different actions that can be taken to improve environmental aspects of customer service delivery
16. the methods available to minimise resource use in customer service delivery
17. the techniques for communicating and developing awareness of environmental matters among community stakeholders
18. the methods that can be used to encourage customers to act in a more environmentally friendly way
19. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

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| <b>Relevant Occupations</b>     | Customer Service Occupations  |
| <b>Suite</b>                    | Customer Service  |
| <b>Keywords</b>                 | customer service delivery; customer service behaviours; processes; environmental awareness; positive action on sustainability; environmental; policies; sustainability; responsibilities; customer service; authority |

## Manage a customer service award programme

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### Overview

This standard is part of the customer service competence area related to Customer Service Delivery. It covers managing a customer service award programme. It includes customer service behaviours and processes that have most impact on the customer experience during Customer Service Delivery. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

A customer service award programme can make a valuable contribution to your organisation's customer service strategy. It serves the dual role of motivating team members and displaying your commitment to customer service to customers. You plan a customer service award programme, identifying the most suitable scheme. You implement your award programme to motivate team members and manage judging, announcement of the results and evaluation of its effectiveness to meet its objectives.

The standard is for customer service professionals on supervisory or managerial levels who manage a customer service award programme for individuals or teams within their organisation.

## Manage a customer service award programme

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### Performance criteria

*You must be able to:*

1. set customer satisfaction and team motivation objectives for a customer service award scheme
2. review internal and external customer service award programme options
3. select customer service award programme options that meet your organisation's needs
4. compare the advantages and disadvantages of each option you have selected
5. choose the option that best matches your customer satisfaction and team motivation objectives
6. identify the benefits and costs of your chosen programme in relation to the objectives set
7. develop the business case for introducing or further developing a customer service awards programme
8. agree the objectives and activities for the programme with decision-makers
9. plan your chosen customer service award programme
10. inform and motivate customers and team members when launching the customer service award programme
11. check that the criteria for the customer service awards are transparent and fair
12. publicise the customer service awards programme to customers to demonstrate your organisation's commitment to excellent customer service
13. organise the judging of individual and team awards
14. announce the results and present awards in a manner that aligns with your organisation's culture
15. evaluate the effectiveness of the customer service awards programme on customers and team members to identify future improvements
16. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Manage a customer service award programme

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### Knowledge and understanding

*You need to know and understand:*

1. how to define the objectives for a customer service award programme covering customer satisfaction and team motivation
2. the different motivation theories and how recognition can act as a motivator for customer service teams
3. the different options available for customer service award programmes that are used by your own and other organisations
4. how to review and select options that will work in your organisation
5. the importance of comparing options to select the approach that will meet the objectives set
6. how to develop a business case and present it to decision-makers to secure their agreement
7. how to make use of customer service award programmes as promotional tools to give added value to customer satisfaction
8. the advantages and disadvantages of the different rewards associated with award programmes
9. the aspects of your organisation's culture that may support or detract from the value of a customer service award programme
10. the methods that can be used to publicise customer service award programmes
11. the importance of ensuring that awards programmes are seen as transparent and fair by customer service employees
12. how to approach potential judges for awards programmes and the skills that they need
13. the ways that judging can take place and how to brief judges
14. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Manage a customer service award programme

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** Managing; award programme; strategy; motivation; commitment; strategic implications; customer service; developing; improving; communication; behaviours; work with others; teamwork

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## Overview

This standard is part of the customer service competence area related to Customer Service Delivery. It covers promoting additional services or products to customers. It includes customer service behaviours and processes that have most impact on the customer experience during Customer Service Delivery. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

You expand and extend the relationship with customers by persuading them to make use of additional services or products that you can offer. You organise customer service to promote additional use of your services or products by communicating with customers and then delivering those services or products effectively. You also monitor your successes and failures to recognise the best way to approach your customers in the future. Services or products are continually changing in organisations to keep up with customers' expectations. By offering new or improved services or products your organisation can increase customer satisfaction and survive in a competitive environment. You keep pace with new developments and encourage your customers to take an interest in them. Your customers expect services or products to be offered to meet their growing expectations and you make them aware of what is available from your organisation.

This standard is for customer service professionals who promote additional services or products to customers.

## Promote additional services or products to customers

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### Performance criteria

*You must be able to:*

1. develop knowledge of your organisation's additional services or products
2. ask colleagues for information about additional services or products
3. identify additional services or products that may interest your customers
4. identify opportunities for offering additional services or products that will enhance their customer experience
5. identify the benefits of additional services or products for your customers and the organisation
6. explain the features and benefits of additional services or products to your customers
7. encourage customers to ask about additional services or products
8. discuss how to promote additional services or products to customers with colleagues
9. implement procedures to respond to customers who are interested in additional services or products
10. promote services or products from other teams and colleagues in your organisation
11. help customers to access services or products which are supplied by other teams and colleagues in your organisation
12. close the conversation if your customer shows no interest in additional services or products
13. give information to progress the sale when customers show interest in additional services or products
14. agree the sale and check customer understanding of the additional services or products to be provided
15. arrange delivery of the additional services or products to your customer by the agreed date
16. refer your customer to colleagues when the additional services or products are provided by other teams
17. compare the different methods used to inform customers about additional services or products and record the successes and failures of each
18. identify the most effective methods for offering additional services or products from your records
19. share information with colleagues about the most effective methods

20. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Promote additional services or products to customers

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### Knowledge and understanding

*You need to know and understand:*

1. how to access information about your organisation's additional services or products
2. the different teams in your organisation that are responsible for supplying additional services and products
3. the colleagues that can support you to develop your knowledge of additional services and products
4. how to match additional services and products with customers interests and needs
5. the ways that offering additional services and products can enhance your organisation's customer service
6. your organisation's procedures and systems for encouraging customers to use additional services or products
7. how the use of additional services or products will benefit your customers
8. how your customer's use of additional services or products will benefit your organisation
9. the methods that can be used to promote additional services or products to customers
10. how to agree promotion approaches with colleagues and decision makers
11. the main factors that influence customers to use your services or products
12. how to introduce additional services or products to your customers by outlining their benefits
13. how to overcome customers reservations and
14. how to agree and provide additional services or products
15. the different methods you can use to give information to your customers about services or products
16. the importance of colleagues to influence customers make decisions about additional services or products
17. how to evaluate the methods used to offer additional services or products and share your finding with colleagues
18. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Promote additional services or products to customers

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** Promoting; services and products; organise; delivery; customer service; communication; problem solving; work with others; team work; listening, hearing; speaking; positive impression; customer service principles; customer service professional

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## Overview

This standard is part of the customer service competence area related to Customer Service Delivery. It covers delivering customer service within specified requirements. It includes customer service behaviours and processes that have most impact on the customer experience during Customer Service Delivery. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers. You organise the delivery and maintenance of excellent and reliable customer service. Your role may involve supervisory or management responsibilities and you take responsibility for the resources and systems you use. You are alert to customer reactions and know how to use them to improve the service that you give. You work with your organisation's service systems to meet or exceed customer expectations. You prepare for each transaction with customers, dealing with different types of customers in different circumstances, checking that you have met their expectations and completed records. You also provide customer service on customer premises, ensuring that your customer enjoys the customer service experience and has confidence that the work you have carried out has been completed successfully. This standard is for customer service professionals who deliver customer service within specified requirements.

## Performance criteria

### *You must be able to:*

1. maintain up to date knowledge of your organisation's services or products
2. organise your work area to prepare to deal with your customers
3. plan, prepare and organise to deliver services or products to different types of customers
4. reorganise your work to respond to unexpected additional workloads
5. maintain service delivery during busy and quiet periods
6. maintain service delivery when systems, people or resources have let you down
7. balance the demands of different customer needs
8. improve the reliability of your service based on customer comments
9. record and store customer service information following organisational guidelines
10. select and retrieve customer service information in the required format
11. locate information to respond to customer queries
12. supply customer service information to colleagues
13. make promises that balance the needs of your customers and your organisation
14. inform your customers when you cannot keep your promises due to unforeseen circumstances
15. adapt your service to meet changes in customers' needs or expectations
16. inform customers when you refer them to a colleague or another organisation
17. check that the service you have given meets your customers' needs and expectations
18. prepare for visits to customer premises confirming when and why you will be there
19. show official identification when visiting customer premises
20. explain what you are going to do and approximately how long you expect the work to take
21. listen to any concerns that your customer may have and reassure them
22. inform customers of work progress and any potential delays
23. inform customers about any variation to the work that could

Deliver customer service within specified requirements

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- involve additional time or cost
- 24. show respect to your customer's premises and possessions by treating them with care
- 25. check that your customer is satisfied with the completed work
- 26. identify how your customer service could be improved
- 27. share information with colleagues to maintain and improve your service delivery
- 28. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out



Deliver customer service within specified requirements

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## Knowledge and understanding

*You need to know and understand:*

1. your organisation's services or products and how to keep your knowledge up to date
2. your organisation's processes and systems for delivering customer service
3. your organisation's guidelines for organising your work area
4. the types of unexpected additional workloads that may arise in your role and how to deal with them
5. your organisation's definition of 'busy' and 'quiet' times and the activities that you should focus on during these periods
6. your organisation's procedures for dealing with unexpected situations and your role within them
7. the resource implications of staff sickness and holiday periods and your responsibilities at these times
8. the importance of having easily accessible information for your customers and your organisation
9. your organisation's procedures and systems for recording, storing, retrieving and supplying customer service information
10. how to assess and prioritise customer requests to balance the demands from different customers
11. the methods that can be used to monitor customer service delivery
12. the colleagues and other organisations that are involved in providing service to your customers and when you may need to refer customers to them
13. how to establish rapport with customers when visiting their premises
14. the importance being sensitive to customer's feelings about their own premises and possessions
15. the insurance implications of working on customer premises
16. the organisational procedures to follow if you cause any accidental damage on customer premises
17. how to identify useful customer feedback and how to decide which feedback should be acted on
18. the methods and systems used to measure your organisation's effectiveness in delivering customer service
19. how to communicate feedback from customers to others to improve customer service

20. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Deliver customer service within specified requirements

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| <b>Originating Organisation</b> | Instructus   |
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| <b>Relevant Occupations</b>     | Customer Service Occupations   |
| <b>Suite</b>                    | Customer Service   |
| <b>Keywords</b>                 | Organising; delivery; reliable; resources; systems; support service; customer service; communication; problem solving; work with others; team working; giving information; receiving information services; |

## Overview

This standard is part of the customer service competence area related to Customer Service Delivery. It covers dealing with customers across a language divide. It includes customer service behaviours and processes that have most impact on the customer experience during Customer Service Delivery. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Customer service is frequently delivered across a language divide. Customer service centres may be in one country but deal mainly with another. In a multi-cultural society, many customers may have a different first language from those who are delivering customer service. This language divide can present a challenge to your delivery of customer service. You prepare to deliver customer service across a language divide and see through delivery. You can deal with customers with different language preferences without having full access to your customers first language. To do this you may use electronic translation tools or contract a language support specialist.

This standard is for customer service professionals who deal with customers across a language divide.

## Deal with customers across a language divide

**Performance criteria***You must be able to:*

1. identify the languages that you are likely to come across when dealing with customers
2. identify your customer's first language and confirm this with them
3. learn a greeting, thank you and a farewell phrase in the languages you expect to deal with
4. identify colleagues who can help you with a language you expect to encounter
5. gather and note useful words and phrases to support your dealings with customers with a different first language
6. use the electronic translation tools to communicate with customers face to face and in writing
7. seek a specialist language support when required
8. establish the expectations of customers regarding whether they expect to deal in your first language or theirs
9. speak clearly when using a language which is not the first language for either you or your customer
10. maintain a consistent tone, volume and pace when dealing with customers across a language divide
11. listen to your customers to identify any words they are using that differs from how you would use them
12. check your understanding of specific words with your customer using questions for clarification
13. seek colleague assistance if you cannot complete a customer transaction because of language barriers
14. reword a question or explanation when your customer does not understand you
15. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Deal with customers across a language divide

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### Knowledge and understanding

*You need to know and understand:*

1. the languages you are most likely to encounter when dealing with your organisation's customers
2. how to greet, thank and say farewell to customers in their first languages
3. the colleagues in your organisation who speak different languages and the languages that they can communicate in
4. the methods you can use to develop your language skills and continue to learn
5. the importance of dealing with customers in their first language when possible
6. the electronic translation tools for verbal and written communication with customers
7. how to seek a language support where required
8. how to explain to a customer that you cannot hold an extended conversation in their first language
9. the importance of tone, pace and volume when dealing with customers across a language divide
10. how to check that you have understood what your customers have said
11. the sources of assistance to use when a language barrier demands additional language skills
12. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Deal with customers across a language divide

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** Meeting; greeting conversation; language barrier; language; first language; language divide; words; phrases; tone; volume; customer service; communication; problem solving; behaviours; work with others; teamwork

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## Overview

This standard is part of the customer service competence area related to Customer Service Delivery. It covers using questioning techniques when delivering customer service. It includes customer service behaviours and processes that have most impact on the customer experience during Customer Service Delivery. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

You use questioning both in planned patterns and in spontaneous conversation to understand what your customer wants and how your organisation can deliver it. You interact with your customers face to face, by voice technology or in online chats.

This standard is for customer service professionals who use questioning techniques when delivering customer service.



## Performance criteria

*You must be able to:*

1. greet your customers using your organisation's guidelines to invite an open response
2. use planned and spontaneous comments to show empathy with your customers
3. request more detailed explanations from your customers
4. listen to customer responses to understand their concerns
5. use open and closed questions to connect with your customers and conduct detailed investigation of their needs
6. identify customers reactions to the information you are seeking
7. follow your organisation's planned question patterns to explore customer opinions in greater detail
8. explore any customer concerns you have identified using spontaneous conversation
9. explain why your organisation needs the information you are asking for
10. use probing questions that build on comments or words used by your customers
11. thank your customers for the information they provide and encourage further open responses
12. record your customers' responses to inform future actions
13. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. why establishing rapport makes it easier to draw information from customers
2. the different ways to greet customers that build rapport with them
3. the reasons for using planned question patterns and scripts to get the information you need
4. the reasons for using spontaneous conversation in addition to planned questions and the type of information that is gathered
5. the importance of active listening when seeking detailed information from customers and how to demonstrate this in your interactions
6. the differences between closed and open questions and when to use them
7. the importance of explaining to customers why information is needed
8. why trigger questions are effective in gaining specific information
9. how to question and respond to customers with the different communication channels and social media platforms that your organisation uses
10. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Use questioning techniques when delivering customer service

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| <b>Status</b>                   | Original   |
| <b>Originating Organisation</b> | Instructus   |
| <b>Original URN</b>             | CFACSB6  |
| <b>Relevant Occupations</b>     | Customer Service Occupations   |
| <b>Suite</b>                    | Customer Service   |
| <b>Keywords</b>                 | Questioning; delivery; conversation; rapport; closed questions; open questions; customer service; communication; problem solving; work with others; teamwork |

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## Overview

This standard is part of the customer service competence area related to Customer Service Delivery. It includes using bespoke software for dealing with customers. It covers planning, organising and controlling customer service operations. It includes customer service behaviours and processes that have most impact on the customer experience during Customer Service Delivery. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers. Customer service is often delivered using bespoke software when dealing with customers face-to-face, by telephone or online. You navigate the system quickly by following recommended routes and using the functionality of the system. Customers are unaware of the details of the system you are using and keep them informed of the different steps you are taking. Your use of the system ensures that you keep records of the transaction so that it can proceed successfully through to the next stages. Most of all, customer satisfaction must drive the interaction and it should not appear to be dominated by the demands of the software.

This standard is for customer service professionals who are responsible for using bespoke software when dealing with customers.

## Use bespoke software for dealing with customers

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### Performance criteria

*You must be able to:*

1. access your organisation's software system using your unique log in details
2. navigate to the bespoke customer service software to check that you can access all the areas you need to carry out your role
3. build your familiarity with the software manual, help screens or help lines to know where to locate technical support when needed
4. prepare your work area to deliver customer service using the bespoke software
5. identify your customers and the services or products they wish to access
6. follow organisational procedures to step through the system to respond to customers' needs
7. use search or other specialist functions within the software to respond to customer requests
8. enter new customer service records using the bespoke software system
9. amend customer service records in the bespoke software system
10. communicate with your customers when the software system using non-technical language
11. follow organisational procedures to structure customer conversations that follow the paths and sequences of the bespoke software
12. interpret and act on error messages to support your customer service
13. refer your customer to colleagues if you are unable to complete transactions
14. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. the log in routines for your organisation's bespoke software system
2. the architecture and geography of the bespoke software system and how to navigate your way around it to access what you need
3. the different screen or menu routes that can be followed to meet customer requirements and how to structure your customer conversations to align with them
4. the sources of support and help for the bespoke software including manuals, help screens and help lines
5. the importance of preparing a work area before delivering customer service and the impact this has on your work
6. your organisation's customers and the services and products that you can offer to them
7. the search or other enquiry facilities within the bespoke software system
8. how to complete new customer records and capture information following your organisation's processes and guidelines
9. the methods used to amend and update customer service records in the bespoke software system
10. the importance of avoiding jargon and system terminology when communicating with customers
11. how to respond to error messages when using a bespoke software system
12. the referral points and sources of information when you are unable to meet customer needs using the bespoke software system
13. the links between the bespoke software system and open networks or social media platforms that may be relevant to communication with your customers
14. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Use bespoke software for dealing with customers

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| <b>Originating Organisation</b> | Instructus   |
| <b>Original URN</b>             | CFACSB7  |
| <b>Relevant Occupations</b>     | Customer Service Occupations   |
| <b>Suite</b>                    | Customer Service   |
| <b>Keywords</b>                 | bespoke software; contact centres; telephone; on-line; functionality; customer service; communication; problem solving; work with others; teamwork; giving information; receiving information services |

## Overview

This standard is part of the customer service competence area related to Customer Service Delivery. It includes maintaining customer service through handover procedures. It covers planning, organising and controlling customer service operations. It includes customer service behaviours and processes that have most impact on the customer experience during Customer Service Delivery. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Customer service delivery in your team involves situations when you are unable to see actions through and you pass on responsibility to a colleague. You organise and follow a recognised pattern to share these responsibilities. You need to be sure that, when responsibility is passed on, the actions are seen through. You routinely check with your colleagues that customer service actions have been completed.

This standard is for customer service professionals who maintain customer service delivery through handover procedures and pass on responsibility for completion of a customer service actions to colleagues.



## Maintain customer service through handover procedures

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### Performance criteria

*You must be able to:*

1. identify the services or products you deliver that rely on teamwork
2. identify steps in the customer service delivery process that require the exchange of information between colleagues
3. agree with colleagues when to pass responsibility for completing customer service actions to each other
4. confirm how information should be exchanged between colleagues to enable completion of customer service actions
5. check that the required information is given to colleagues when handing over responsibility to them
6. maintain awareness of all details of customer service actions your colleagues are due to complete
7. ask your colleagues about their completion of the customer service actions agreed
8. identify follow up customer service actions if your colleagues have been unable to complete the work you handed over
9. review with your colleagues the way that customer service actions are shared
10. plan and agree improvements to how customer service actions are shared between colleagues
11. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. your organisation's customer service procedures and systems used for the services or products you are involved in delivering
2. the handover procedures for exchanging information with colleagues to deliver customer service
3. the colleagues that you can pass responsibility for completing customer service actions to and their roles
4. the methods used to ensure that all the required information is handed over between you and your colleagues
5. the organisational procedures and communication media and platforms that you can use to handover information to colleagues
6. the importance of checking that colleagues have understood the actions that they need to carry out to complete service
7. the importance of checking with a colleague whether they have completed the customer service actions you were expecting
8. the situations when you may be required to take follow up actions when you colleagues have been unable to complete the handover actions
9. how to review the way customer service actions are shared in customer service processes with colleagues
10. the methods used to identify and agree potential improvements to handover procedures
11. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Maintain customer service through handover procedures

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** Delivery; responsibility; colleagues; working together; customer service; communication; problem solving; work with others; giving information; teamwork; receiving information services

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## Overview

This standard is part of the customer service competence area related to Handling Problems, Queries and Complaints. It includes dealing with customer queries, requests and problems. It covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

You provide consistent and reliable customer service, however your customers will sometimes expect more. They can signal this in various ways and when they do you know how to handle the situation.

Customers ask different questions and request special treatment and you respond to these within your organisation's guidelines. However, some problems will occur that you cannot resolve because you do not have the authority or experience to deal with them. In these circumstances you collect information for colleagues to deal with the problems or use a specialist support.

This standard is for customer service professionals who deal with customer service queries, requests and problems by passing information to colleagues and keeping customers informed about what is being done.

## Deal with customer queries, requests and problems

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### Performance criteria

*You must be able to:*

1. deal with queries and requests from customers following your organisation's guidelines
2. seek information from colleagues to answer customer queries or requests
3. inform your customer what is happening to deal with their queries or requests
4. identify problems from your customers point of view
5. intervene to minimise the impact of problems you identify
6. deal with challenging customer behaviours following your organisation's procedures
7. acknowledge when your customers are raising a problem
8. listen to your customers to develop your understanding of their problems
9. take details to identify your customer transactions using your organisation's systems
10. ask questions to clarify what has caused customers problems
11. check your understanding of what customers see as the problem
12. ask questions to clarify customer expectations about the services or products that are causing problems
13. record what your customers tell you about problems in your organisation's systems
14. confirm the details of what customers have told you about the problem back to them
15. identify sources of information that your organisation uses to identify customer transactions causing problems
16. gather details from colleagues, customer service records or product specifications to resolve problems
17. tell customers the actions you will take to resolve their problem
18. tell your customers the next steps in your organisation's process without making promises
19. pass the customers problem details to colleagues who can deal with them
20. seek specialist support where problems or issues cannot be resolved
21. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Deal with customer queries, requests and problems

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### Knowledge and understanding

*You need to know and understand:*

1. the colleagues in your organisation who are able to give help and information
2. your role and responsibilities in relation to dealing with queries, requests and problems and the limits of your authority
3. the communication techniques that you can use to speak to people who are dissatisfied to acknowledge their needs
4. how to deal with customers who are more demanding than usual and use behaviours that you find challenging
5. the expectations that customers have of your organisation's services and products
6. the importance of recognising problems from what customers say or do
7. how to recognise a problem expressed by a customer through social media
8. how to collect details of customer service problems expressed through social media
9. the customer service behaviours that can make a problem worse and how to manage yourself to avoid using these
10. the customer expectations of your organisation's services or products that may cause problems if they are not met
11. how to respond to customers who raise problems in a way that reassures them that you can help
12. the reference codes or identifiers that your organisation uses to identify customers
13. the types of questions that can be used to gather information to resolve problems
14. the information that your organisation needs to resolve customer problems
15. the details that your organisation uses to identify specific customer transactions
16. the teams and colleagues to whom you should pass details of problems
17. the types of specialist support, where required
18. your organisation's processes and systems for passing on details of problems to colleagues
19. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Deal with customer queries, requests and problems

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** customer queries; customer requests; customer problems; recognition; customer expectations; dissatisfaction; customer service; communication; problem solving; behaviours; work with others; giving information; teamwork;

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## Overview

This standard is part of the customer service competence area related to Handling Problems, Queries and Complaints. It includes monitoring and solving customer service problems. It covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers. You deliver and organise customer service, however some of your customers will experience problems and you can spot and solve these before your customers even know about them. You also get involved in changing systems to avoid repeated customer service problems. Some customers judge the quality of your customer service by the way that you solve customer service problems. You impress customers and build their loyalty by sorting out problems and impress customers in a way that would not have been possible if everything had gone smoothly. Sometimes you may seek specialist support where a problem cannot be resolved. You also manage your customers when they expect more than your organisation can offer or because your service procedures have not been followed.

This standard is for customer service professional who monitor and solve customer service problems.



## Monitor and solve customer service problems

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### Performance criteria

*You must be able to:*

1. respond to customer service problems following organisational guidelines
2. listen carefully to your customers when they raise problems
3. ask your customers about the problem to check your understanding
4. identify problems with systems and procedures before they begin to affect your customers
5. solve problems with service systems and procedures that might affect customers before they become aware of them
6. inform managers and colleagues of the steps taken to solve systems and procedures problems
7. identify repeat customer service problems
8. compare the solutions for dealing with repeat customer service problems and the advantages and disadvantages of each
9. select the best solution for solving a repeat customer service problem, balancing customer expectations with your organisation's needs
10. obtain approval for the solution from decision makers to reduce the chance of problems being repeated
11. action and monitor your agreed solution to reduce repeat problems
12. work with colleagues to identify and confirm the options to resolve a customer service problem
13. evaluate the advantages and disadvantages of each option for your customer and your organisation
14. select the best option to meet your customers and your organisation's needs
15. discuss and agree the options for solving the problem with your customers
16. seek specialist support to resolve customer problems, when required
17. take action to implement the option agreed with your customers
18. work with colleagues and customers to check that any promises related to solving the problem are kept
19. keep your customers informed about what is happening to solve their problem
20. confirm with your customers that the problem has been solved to their satisfaction

Monitor and solve customer service problems

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21. give clear reasons to your customer when you are unable to solve the problem to their satisfaction
22. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Monitor and solve customer service problems

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### Knowledge and understanding

*You need to know and understand:*

1. your organisation's procedures and systems for dealing with customer service problems
2. how to actively listen to customers when they raise concerns to demonstrate empathy and understanding
3. the types of questions that help to gather information about problems and customer feelings about them
4. your organisational procedures and systems for identifying repeated customer service problems
5. how the successful resolution of customer service problems contributes to customer loyalty with external customers and improved working relationships with service partners or internal customers
6. the methods used to identify repeat service problems
7. how to develop potential solutions to problems with colleagues
8. the importance of balancing customer expectations with your organisation's needs
9. how to negotiate with and reassure customers while their problems are being solved within the agreed timescales
10. the opportunities and potential for monitoring and solving customer service problems using remote information collection and sharing such as through social media
11. how to defuse potentially stressful situations related to customer service problems
12. the limitations of what you can offer your customers in relation to your organisation's services and products
13. the types of action and behaviours that may make a customer problem worse and how to avoid these
14. how to choose the most effective method of communication when dealing with customer service problems
15. how to use of remote communications with customers through social media when resolving customer problems
16. the types of specialist support to resolve customer problems, when required
17. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Monitor and solve customer service problems

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| <b>Relevant Occupations</b>     | Customer Service Occupations  |
| <b>Suite</b>                    | Customer Service  |
| <b>Keywords</b>                 | monitor problems; customer service problems; customer loyalty; impress; customer service; communication; problem solving; work with others; team working; giving information; receiving information services; |

## Overview

This standard is part of the customer service competence area related to Handling Problems, Queries and Complaints. It includes assessing the risks in customer service. It covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

You use formal or informal risk assessment techniques to reduce any risks involved in the provision of customer service. Your organisation's provision of customer service involves a range of risks that may be financial, reputational or health and safety risks. As part of your customer service role, you identify and assess individual risks to classify and prioritise them, enabling you to take actions to minimise risks.

This standard is for customer service professionals who assess the risks in customer service.

## Performance criteria

*You must be able to:*

1. identify the stages in your organisation's customer service process that provide opportunities to impress and disappoint customers
2. identify the financial risks for each stage of the customer service process
3. identify the reputational risks for each stage of the customer service process
4. identify the health and safety risks for each stage of the customer service process
5. identify the risk of delivering sub-standard services or products in each stage of the customer service process
6. ensure that your customers are aware of any risks that might impact on them
7. develop staff awareness of the risks you have identified
8. assess the probabilities of each risk that you have identified
9. assess the potential consequence of each risk in terms of finance, reputation and health and safety
10. classify each risk as high, medium or low considering its probability and potential consequences
11. consult with colleagues to identify any actions to take to reduce risk
12. implement actions to minimise the overall customer service risk profile
13. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. your role and responsibilities in relation to assessment of risk in customer service
2. your organisation's customer service stages and the points in the customer service processes that have most impact on the customer experience
3. the risk assessment techniques and processes that are used in your organisation
4. the types of potential customer service risks that your organisation has, including financial, reputational and health and safety risks
5. the impact that sub-standard services or products in each stage of the customer service process have on your organisation and customers
6. the methods that you can use to create risk logs to capture and analyse risks
7. how to classify risk based on probability and potential consequences
8. your organisation's records related to risk assessment
9. how to conduct a cost and benefit analysis for customer service
10. how to produce a Strengths, Weaknesses, Opportunities, Threats (SWOT) and Political, Economic, Social, Technological, Legal, Environmental (PESTLE) analysis
11. how SWOT and PESTLE analyses link to risk management
12. the colleagues who manage risk in your organisation and how to communicate with them
13. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Assess the risks in customer service

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**Suite** Customer Service

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**Keywords** risk assessment; risks; health; safety; awareness; identifying; assessing; classifying; prioritising; minimise risks; customer service; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving

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## Overview

This standard is part of the customer service competence area related to Handling Problems, Queries and Complaints. It includes handling customer complaints. It covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Customer complaints may be unjustified, but you need to respond to them and offer a resolution or compensation to meet your customers' expectations. You investigate complaints and the different options for their resolution. Your organisation has formal procedures for dealing with complaints and you follow these. You also handle complaints referred to you by front-line staff or supervisors, because they have implications for your organisation due to their severity, or because the customer will only accept the solution when it is dealt with at a senior level. You have the authority and influence to adapt existing policies and procedures to find an acceptable solution. You also analyse variety of complaints over time to allow adaptation of services, functions, work processes and training to avoid repeat complaints. Some elements of handling the complaints may not be carried out to final stage by the practitioners and would require escalation to a specialist.

This standard is for customer service professionals who handle customer complaints.

## Handle customer complaints

**Performance criteria**

*You must be able to:*

1. identify signs that customers are becoming dissatisfied with the customer service of your organisation
2. prevent queries or problems becoming a complaint
3. confirm that you understand the nature and details customer complaints
4. investigate the facts of complaints to establish whether they are justified or unjustified
5. identify possible options to solve complaints
6. consider the advantages and disadvantages of each option for your customer and for your organisation
7. assess the risks to your organisation of choosing each option
8. report the findings of your investigation to your customer and offer your chosen solution
9. escalate the complaint by involving more senior colleagues or an independent third party when required
10. give feedback to colleagues involved to avoid future similar complaints
11. record how the complaint has been handled to avoid later misunderstandings
12. collect all the available information on the nature of complaints that are referred to you
13. analyse the organisational implications of the referred complaint
14. take personal responsibility for dealing with the referred complaint within the limits of your authority
15. keep customers informed about what steps are being taken to deal with their complaint
16. follow the procedures to escalate the complaint even higher if customers request this, or if the complaint has wider implications for your organisation
17. escalate unresolved complaints to a specialist, where required
18. identify a range of possible solutions that balance customer expectations and your organisation's services and products
19. liaise with your customer and colleagues to negotiate an acceptable solution
20. agree a solution that adapts current policies and procedures within your own authority and furthers your organisation's aims and objectives
21. implement the agreed solution and check that customers are

- satisfied with the action that has been taken
22. analyse customer complaints throughout period of time to identify adaptations to services, working processes or training that may be required
  23. identify potential changes to customer service policies and procedures to reduce complaints
  24. consider the advantages and disadvantages of each potential change in terms of balancing customer service and organisational aims
  25. recommend changes to organisational policies and procedures to decision makers
  26. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Handle customer complaints

## Knowledge and understanding

*You need to know and understand:*

1. your organisation's complaints procedures and the limits of your authority
2. why dealing with complaints is a fundamental part of delivering customer service
3. how to spot and interpret signals that customers may be considering making a complaint
4. the techniques you can use to handle conflicts with customers
5. the importance of dealing with complaints within your organisation's agreed timescale
6. why the offer of compensation or replacement service or products is not always the best option for resolving a complaint
7. how the successful handling of a complaint presents an opportunity to impress a customer who has been dissatisfied
8. the most effective forms of response when complaints are submitted through different channels such as social media
9. the importance of minimising customer complaints and dealing with them as they occur
10. how to negotiate a solution with customers that is acceptable to them and your organisation
11. the regulatory definition of a complaint in your sector and the requirements of how complaints should be handled and reported
12. when and how to escalate a complaint to more senior members of your organisation or an independent third party
13. the cost and regulatory implications of admitting liability for an error made by your organisation
14. the procedures systems used to escalate complaints in your organisation
15. the importance of monitoring the level and pattern of complaints to identify those that should provoke a review of customer service delivery
16. the types of complaints that can have wider implications for your organisation
17. why it is important to communicate with your customer at all stages of a complaint's procedure
18. the specialist support that may be required for resolution of a complaint
19. how to devise solutions that balance customer expectations and

organisational aims

20. why and when it may be necessary to adapt organisational policies and procedures to provide a solution acceptable to your customer and how to justify this
21. the analysis of customer complaints to identify required changes in functions, working processes or policies
22. how to identify any training as a result of complaints' analysis
23. how to explore the implications of the patterns and trends for your organisation's policies and procedures
24. how to recommend changes to organisational policies and procedures and the decision makers involved
25. the advantages and disadvantages of using different forms of response when complaints have originated through different channels such as social media
26. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Handle customer complaints

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| <b>Date Approved</b>            | February 2021  |
| <b>Indicative Review Date</b>   | March 2026   |
| <b>Validity</b>                 | Current  |
| <b>Status</b>                   | Original   |
| <b>Originating Organisation</b> | Instructus   |
| <b>Original URN</b>             | CFACSC7, CFACSC8   |
| <b>Relevant Occupations</b>     | Customer Service Occupations   |
| <b>Suite</b>                    | Customer Service   |
| <b>Keywords</b>                 | Complaints; problems; procedures; resolution; compensation; customer service; communication; problem solving; work with others; teamwork; giving information; receiving information services; products; solutions; |

## Monitor the quality of customer service transactions

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### Overview

This standard is part of the customer service competence area related to Handling Problems, Queries and Complaints. It includes monitoring the quality of customer service transactions. It covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

You monitor the quality of customer service transactions to improve the overall quality of your organisation's customer service. You measure quality and improvements of high volume of customer service transactions delivered face-to-face, by telephone or online by adopting a systematic sampling approach. This involves you assessing performance agreed criteria and performance ratings. You use spot checks and routine checks to observe colleague performance and analyse results to identify patterns and trends. You provide feedback to colleagues so that actions to improve individual performance can be taken.

This standard is for customer service professionals on supervisory or managerial levels who monitor the quality of customer service transactions and work with colleagues to improve their performance.

## Monitor the quality of customer service transactions

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### Performance criteria

*You must be able to:*

1. identify the criteria for monitoring the quality of customer service transactions
2. agree a sampling frame for monitoring customer service transactions
3. plan monitoring that complies with your organisation's guidelines for informing staff and customers that they are being monitored
4. identify rating scales for measuring the quality of customer service transactions
5. develop knowledge of the customer service procedures for transactions you are monitoring
6. carry out spot checks or observations of the quality of customer service transactions
7. carry out planned routine checks or observations of the quality of customer service transactions
8. observe or listen to a colleague dealing with a customer service transaction
9. record your observations of colleagues performance against agreed quality criteria
10. make judgements about quality of service delivery by allocating performance ratings on the rating scale
11. summarise your observations to identify patterns and trends in colleagues performance
12. provide feedback to colleagues that highlights the features of customer service where they met your organisation's requirements
13. give feedback to colleagues about aspects of their customer service delivery that they need to develop to meet your organisation's
14. propose action plans for coaching or training to improve colleagues customer service delivery when required
15. maintain records of customer service quality monitoring and action plans for improvements
16. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out



## Monitor the quality of customer service transactions

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### Knowledge and understanding

*You need to know and understand:*

1. the agreed quality criteria for judging the quality of customer service delivery in your organisation
2. the methods used to construct a representative sample of customer service transactions for monitoring quality
3. the importance of compliance with guidelines about ensuring customers and colleagues know they are being observed to monitor quality of service, and how they are informed
4. the ratings and scales that your organisation uses to judge customer service transactions
5. your organisation's procedures and guidelines for customer service transactions
6. how to record details of customer service transactions you have spot checked and observed to provide feedback
7. the advantages and disadvantages of routine and spot checks
8. how to listen or listen to a colleague dealing with a customer service transaction without disrupting or distracting them
9. how to complete monitoring records using your organisation's agreed quality criteria
10. how to allocate performance ratings for colleagues when judging the quality of their customer service
11. the techniques used to identify patterns and trends in customer service delivery when you are analysing and summarising your monitoring activities
12. how to provide feedback to colleagues that helps them to explore their performance against your organisation's requirements
13. the importance of providing feedback that highlights effective performance in addition to identifying areas for improvement
14. the sources of information about coaching and training options to improve customer service delivery and how to
15. the importance of keeping detailed records of service quality monitoring, coaching and training relating to colleagues' customer service delivery
16. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Monitor the quality of customer service transactions

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| <b>Version Number</b> | 1 |
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| <b>Originating Organisation</b> | Instructus |
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|                     |          |
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| <b>Original URN</b> | CFACSD13 |
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| <b>Relevant Occupations</b> | Customer Service Occupations |
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| <b>Suite</b> | Customer Service |
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|                 |  |
|-----------------|--|
| <b>Keywords</b> | monitoring quality; customer service transactions; performance ratings; face- to-face; telephone monitoring; online; measure performance; patterns and trends; customer service; contact centres; developing; improving; |
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## Overview

This standard is part of the customer service competence area related to Customer Service Management. It includes leading a team to develop and improve customer service. It covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

You are responsible for leading a team delivering customer service. You plan and organise their work and support them as they develop their performance. You look at both your organisation and your staffing resources and bring these together in a constructive way to improve overall customer service. You give support and guidance to your team to encourage them to improve their customer service delivery. You share your enthusiasm with your team and lead it by your example. You develop new staff to your organisation's required standards and update established staff on new procedures and techniques.

This standard is for customer service professionals at supervisory or managerial level of responsibility who lead a team to develop and improve customer service.

## Performance criteria

### *You must be able to:*

1. agree the different roles for delivering customer service with team members
2. involve team members in planning and organising their customer service work
3. allocate work based on team members' customer service skills and the objectives of your organisation
4. motivate team members to work together to improve their customer service performance
5. check that team members understand their roles in delivering customer service
6. identify the support that team members may need to perform their roles
7. provide team members with support and direction when they need help
8. provide feedback to team members about their customer service performance
9. encourage team members to review and discuss their own customer service performance
10. agree actions with team members to improve their customer service performance
11. identify when training and development is needed to improve customer service performance
12. help team members to identify their own development and training needs
13. agree the staff development and training activities that are needed to develop customer service performance
14. report staff development needs to colleagues who are responsible for training and development
15. agree the aims and objectives of customer service development and training activities with colleagues who are responsible for training and development
16. confirm the methods of customer service development and training that match with the aims and objectives agreed
17. organise customer service development and training activities for your team members
18. monitor the performance of team members following development and training to confirm that learning is put into practice
19. organise additional development and training for team members

when needed

20. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. the current objectives and targets that relate to customer service in your area of responsibility
2. the roles and responsibilities of your team members and where they fit within the overall structure of your organisation to deliver customer service
3. how team and individual performance can affect the achievement of organisational objectives for customer service delivery
4. how to encourage your team to plan and organise their customer service work activities
5. how to plan and allocate work to your team in a way that gains their understanding and commitment
6. how to involve and motivate staff to encourage teamwork to continuously improve customer service delivery
7. how to facilitate meetings to encourage open discussion between team members to clarify their roles and how they relate to each other
8. how to provide feedback to recognise effective performance and deal sensitively with issues of underperformance
9. the importance of continuously developing staff who provide customer service and encouraging them to review their own performance
10. the methods used to agree improvement actions with team members and the types of actions that may be required
11. how to identify when development and training would improve customer service performance
12. the range of types development and training available and how to select those that are appropriate to customer service, your organisation, the specific training and development aims and objectives, and budget
13. the colleagues in your organisation who are responsible for development and training activities and how to report your identified team training needs to them
14. the importance of providing input to the design and delivery of customer service development and training for your staff and the impact this has
15. the importance of organising development and training activities so that they have limited impact on the delivery of your

Lead a team to develop and improve customer service

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- organisation's day to day delivery
16. how you can help staff to put what they have learned during training into practice in the workplace
  17. how to assess the impact that development and training has had on customer service performance
  18. the types of additional support you could provide to team members following development and training
  19. the implications of failure to improve customer service for your team members and your organisation
  20. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Lead a team to develop and improve customer service

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**Original URN** CFACSD11, CFACSD15

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** team leading; customer service; contact centres; staffing resources; support, guidance; leading by example; developing; improving; communication; problem solving; work with others; teamwork; giving information; receiving information;

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## Overview

This standard is part of the customer service competence area related to Customer Service Management. It covers improving customer service through use of technology and other resources. It covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments.

Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Customer service changes and improves when new technologies and resources are used. You identify and specify opportunities for customer service improvements and evaluate options for applying technology or other resources to improve customer service. You develop and improve customer service within a framework of organisational procedures, regulation and legislation. You oversee the implementation of technology and resource changes to improve customer service and review the results.

This standard is for customer service professionals on supervisory or managerial levels who improve customer service through use of technology and other resources.

## Performance criteria

*You must be able to:*

1. monitor developments in technology and other resources to improve customer service
2. review the use of resources and technology in your organisation's customer service delivery systems and processes
3. identify opportunities and options for improving customer service using technology and other resources
4. analyse the potential customer service benefits for the improvement options you have identified
5. calculate the costs associated with each option for improving customer service
6. estimate the affordability of each option to improve customer service
7. identify the option that best meets your organisation's needs
8. specify the effects that your chosen option will have on your organisation's services and products, and customer perceptions
9. produce a business case to propose improvements to customer service using technology and other resources
10. identify organisational policies, procedures and practices that may impact on your proposed customer service improvements
11. follow your organisation's procedures to gain approval from decision makers for your proposed improvements in customer service
12. agree with colleagues or service partners the actions needed to meet organisational requirements when implementing the customer service improvements
13. agree customer service improvements with decision makers when your proposals require authorisation above your level of authority
14. identify legislation and external regulation that may affect the implementation of customer service improvements
15. balance the requirements of legislation and external regulation with the needs of your organisation when implementing customer service improvements
16. plan the implementation of customer service improvements using technology and other resources
17. brief customer service colleagues about the implementation of improvements and the expected benefits
18. monitor the implementation of customer service improvements and the expected benefits

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19. review the implementation of customer service improvements with customer service colleagues
  20. make adjustments to implementation of customer service improvements based on your review

## Knowledge and understanding

*You need to know and understand:*

1. the current trends in technology that imply changes to the channels and social media platforms used by customers
2. the features and functionality of available technology that may contribute to improvements in customer service
3. how the application of additional resources other than technology can be used to improve customer service
4. the methods used to conduct a systematic review of your customer service systems
5. the techniques used to analyse the costs and benefits of options for improving customer service
6. how to estimate the affordability of options for making improvements in customer service
7. the importance of evaluating the benefits of different options for improving customer service to select the most relevant to recommend
8. how to analyse the impact that your options may have on customer perceptions and the services and products that your organisation offers
9. the methods and format for presenting a business case to make improvements in customer service in your organisation
10. the organisational policies, procedures and practices that you need to follow when you propose improvements in customer service
11. how to gain approval to change customer service procedures or practices and the decisions makers that you need to approach
12. how you involve colleagues or service partners in the implementation of improvements
13. the limits of your own authority and who else in the organisation needs to be involved if you cannot authorise improvements alone
14. the legislation and external regulation relating to consumer protection and data protection
15. the legislation and external regulation relating to diversity, inclusion and discrimination
16. the legislation and external regulation relating to health and safety of customers and colleagues
17. the importance of balancing the requirements of legislation and external regulation with the needs and objectives of your

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organisation

18. the briefing techniques for introducing colleagues to changes
19. the methods used to monitor and review the improvements implemented with customer service colleagues
20. how to adjust customer service delivery after the implementation of changes and how to communicate these to customer service colleagues

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Improve customer service through use of technology and other resources



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**Originating Organisation** Instructus

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** Rules; regulations; legislation; improve customer service; customer service; contact centres; developing; improving; communication; problem solving; work with others; teamwork; giving information; receiving Information;

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## Overview

This standard is part of the customer service competence area related to Customer Service Management. It includes supporting and implementing customer service improvements. It covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Your organisation changes the way they deliver service as customer expectations rise when other organisations improve the services they offer. You deliver customer service and support your organisation to implement changes, presenting them positively to your customers. By listening to customer comments, you also have your own ideas about how the service you deliver could be improved. You present your own ideas for improvements to decision makers in your organisation who can authorise implementation of changes. You contribute to planning customer service improvements, maintain the changes that need to take place to implement improvements, and help to evaluate the results. This standard is for customer service professionals on supervisory or managerial levels who support and implement customer service improvements.

## Support and implement customer service improvements

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### Performance criteria

*You must be able to:*

1. gather formal and informal feedback from your customers
2. use your organisation's procedures to gather feedback from your customers
3. use the information from your customers to develop your understanding of their customer service experience
4. identify changes that could be made to improve customer service based on information you have gathered
5. present your ideas for improving customer service to decision makers with authority to approve the changes
6. plan the introduction of customer service improvements, including the resources required to implement them
7. evaluate factors that may help or hinder the introduction of improvements
8. develop realistic objectives, tasks and schedules for the introduction of improvements and agree them with your team
9. plan how you will evaluate customer service improvements
10. inform the colleagues who will be affected by changes and win their support for implementation of your ideas
11. support changes to customer service based on ideas proposed by other team members
12. keep your customers informed of changes to customer service giving a positive impression of the changes
13. resolve any difficulties that arise during the implementation of improvements
14. provide support to your colleagues who are involved with changes and improvements
15. ensure improvements are implemented within the agreed time and budget
16. work with your team to identify any negative effects of changes and plan to avoid them
17. monitor the impact that the changes have on customer service quality
18. recommend any further changes that may be necessary to decision makers
19. identify any learning from the change process for future improvement activities
20. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out



## Knowledge and understanding

*You need to know and understand:*

1. how customer experience is influenced by the way service is delivered and the importance of gathering formal and informal feedback
2. how to gather formal and informal customer feedback using your organisation's procedures to capture information
3. the methods that can be used to understand your organisation's customer service from the customers perspective
4. how to use customer feedback and your own experience of delivering customer service to identify changes that could improve your organisation's service
5. the decision makers in your organisation who can authorise changes and how to present your ideas to them
6. the importance of careful planning when introducing changes
7. the types of factors that may help or hinder the process of change and how to identify and plan for these
8. how to develop plans that contain realistic objectives, tasks and schedules
9. the importance of planning the evaluation of customer service improvements implemented
10. the importance of clear communication with your team when changes are taking place and how to win over staff who are resistant to change
11. how to develop your understanding and commit to ideas for changes that other team members have suggested
12. how to work with others to identify and support change in the way service is delivered
13. why it is important to give a positive impression to your customer about the changes made by your organisation even if you disagree with them
14. the types of support that your team may need when improvements are being implemented and how to provide support
15. why it is important to complete change on time and within budget
16. the importance of identifying any negative effects of customer services changes that were not anticipated and take action to avoid them to minimise their impact
17. how to monitor and evaluate the impact of changes on customer service quality

18. the methods used to recommend further changes that are identified through monitoring and evaluation processes
19. why it is important to evaluate changes and to note what has been learned for future initiatives
20. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Support and implement customer service improvements

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| <b>Originating Organisation</b> | Instructus |
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| <b>Original URN</b> | CFACSD2, CFACSD14 |
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| <b>Relevant Occupations</b> | Customer Service Occupations |
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| <b>Suite</b> | Customer Service |
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| <b>Keywords</b> | customer service; contact centres; improvements; develop; communication; problem solving; work with others; teamwork; giving information; receiving information services; products; implementing quality; improvements; |
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## Overview

This standard is part of the customer service competence area related to Customer Service Management. It includes reviewing the quality of customer service. It covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Your organisation needs to know how effectively customer service is being delivered to establish if customer satisfaction and loyalty. You plan to review the quality of your organisation's customer service by collecting and analysing information. You develop conclusions and recommendations and then report your findings to decision makers. You approach the review of customer service quality systematically and make full use of your findings. You also take a systematic approach to reviewing and re-engineering customer service processes. Your review balances customer satisfaction, cost awareness and compliance with regulation. Your reviews are undertaken with the agreement and support of colleagues with authority to make changes. You also take account of the views of colleagues who deliver the process and are in direct contact with customers.

This standard is for customer service professionals on supervisory or managerial levels who review the quality of customer service within their organisation.

## Review the quality of customer service

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### Performance criteria

*You must be able to:*

1. identify the features of customer service delivery that affect customer satisfaction and loyalty
2. plan reviews of customer service delivery features and processes that affect customer satisfaction and loyalty using defined criteria
3. agree the boundaries of customer service processes to be reviewed with decision makers
4. set parameters for the types of change possible during process re-engineering  
communicate the aims of reviews with colleagues who are affected
5. implement your plans for reviewing customer service features and processes
6. identify all the key steps in customer service processes
7. analyse each step in the customer service processes in fine detail
8. assess each step in the customer service processes considering customer satisfaction, costs and compliance with relevant regulation
9. raise questions about each step in the current process to establish where there is scope for development and improvement
10. explore all the questions raised with colleagues involved in the process and their managers
11. analyse the information you have collected to identify patterns and trends
12. compare the conclusions of your analysis with the defined criteria
13. adapt your approaches if the agreed methods of collecting and analysing information are ineffective
14. identify and evaluate options for re-engineering improvements
15. communicate the results of your reviews to customer service decision makers
16. agree with decision makers the actions to improve customer service based on your reviews of features and processes
17. plan the implementation of agreed recommendations for improving customer service features and processes
18. implement re-engineering of customer service processes
19. monitor the results of implementing re-engineering of the customer service process
20. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Review the quality of customer service

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### Knowledge and understanding

*You need to know and understand:*

1. the importance of measuring the quality of customer service including levels of satisfaction and loyalty
2. how to identify the features and processes that affect your customers satisfaction with your organisation
3. how to plan to review customer service delivery including defining the criteria you will use for measurement of customer service
4. the types of information collection methods that you can use in your organisation
5. how to make use of all available sources of information and feedback about service quality including what is available through social media
6. the ways to establish boundaries around a customer service process to be re-engineered
7. the decision makers who need to be involved when re-engineering processes to ensure that the recommendations can be implemented
8. the importance of communicating with those involved in service delivery when re-engineering the process
9. the ways to analyse and assess the effectiveness of separate steps in the customer service process
10. the importance of identifying the right questions to challenge existing customer service processes
11. the techniques used to explore processes with customer service colleagues and their managers
12. the methods of analysing information on the quality of customer service to identify patterns and trends in the data
13. the importance of comparing conclusions with the criteria you defined during planning
14. how to identify recommendations that flow from your review of customer service
15. the procedures and formats for making recommendations on customer service improvements within your organisation
16. the communication methods used to agree actions for improvements with decision makers and their teams
17. how to plan the implementation of customer service improvements when your recommendations have been agreed
18. the techniques for implementing changes in customer service

processes

19. the importance of monitoring the results of customer service process changes
20. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Review the quality of customer service

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** Delivery; quality; expectations; planning; collecting; analysing; measuring; customer service; communication; problem solving; work with others; teamwork; giving information; receiving information services; review;

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## Overview

This standard is part of the customer service competence area related to Customer Service Management. It includes developing a customer service strategy. It covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

To be consistently successful in customer service, your organisation needs a customer service strategy. You use your knowledge of your organisation's customers and your expertise in customer service to develop a customer service strategy that aligns with your organisation's overall strategy for your area of responsibility. You base your strategy on research into other organisations and current trends in customer service and consult your team for their opinions.

This standard is for customer service professionals on supervisory or managerial levels who develop a customer service strategy.

## Develop a customer service strategy

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### Performance criteria

*You must be able to:*

1. identify your organisation's overall business strategy, values, aims and objectives
2. identify how your area of responsibility supports the achievement of your organisation's overall business strategy
3. evaluate the implications of the overall business strategy for customer service in your area of responsibility
4. confirm the implications of the overall business strategy for delivering customer service with your manager
5. identify other organisations that represent models of good practice in customer service
6. evaluate the key features of customer service in other organisations and the principles that underpin their approaches
7. analyse current research on trends and developments in customer service
8. explore the implications of your research for your area of responsibility
9. discuss the outcomes of your research with your team to agree what you will include in your customer service strategy
10. construct a customer service strategy for your area of responsibility
11. define customer service strategy values, aims and objectives based on your research for your area of responsibility
12. identify processes and communication channels for customer service that match your defined values, aims and objectives
13. outline how you will evaluate the effectiveness of the strategy
14. agree your customer service strategy with your manager
15. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. how to access information on your organisation's overall business strategy and analyse its implications for your area of responsibility
2. the operational objectives for your area of responsibility and how these link to your organisation's overall business strategy
3. the importance of having a customer service strategy for your area of responsibility and how to align it with your organisation's business strategy
4. the sources of information you can use to find out about your customers and their expectations
5. how to identify other organisations which might represent models of best practice in customer service that you can learn from
6. the principles that underpin other organisation's approaches to customer service and how to evaluate their key features to identify those that you would like to implement in your own organisation
7. the sources of research on trends and developments in customer service, including how to access and analyse them
8. the importance of using the findings from your research to identify what you need to include in your customer service strategy
9. how to share your research findings with your team, discuss the implications and agree what you should include in your customer service strategy
10. the methods used to develop a customer service strategy and what it should include
11. how to define values, aims and objectives relevant to your area of responsibility and the strategic objectives that have been agreed
12. the communication channels and processes that support customer service within your organisation
13. the methods used to evaluate how effective your customer service strategy is in meeting strategic objectives
14. the procedures for making recommendations to your manager and how to agree your strategy
15. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Develop a customer service strategy

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| <b>Developed by</b> | Instructus |
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| <b>Originating Organisation</b> | Instructus |
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| <b>Original URN</b> | CFACSD16 |
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| <b>Relevant Occupations</b> | Customer Service Occupations |
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| <b>Suite</b> | Customer Service |
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| <b>Keywords</b> | customer service strategy; managers; senior staff; expertise; research; trends; customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others; team working; |
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## Overview

This standard is part of the customer service competence area related to Customer Service Management. It includes managing customer service performance. It covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Customer service performance is measured by a wide variety of metrics and ratings collected in different ways by your organisations. You use your organisation's metrics and quality monitoring ratings to manage customer service performance systematically and identify actions for improvement. You collect information and interpret it by referring to standards, benchmarks, targets and tolerances. You also identify trends and patterns in quality monitoring results and adjust performance targets.

This standard is for customer service professionals on supervisory or managerial levels who manage customer service performance.

## Manage customer service performance

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### Performance criteria

*You must be able to:*

1. collect metrics on customer service operations performance
2. interpret broad patterns of customer service operations metrics
3. investigate the questions raised by your interpretation and analysis of performance
4. interpret customer service performance metrics for your organisation's services and products
5. match customer service performance metrics to benchmarks, targets, standards and agreed tolerances
6. analyse customer service performance metrics to identify patterns and trends
7. compare customer service performance metrics with your organisation's quality monitoring ratings
8. review the resource requirements related to managing customer service performance
9. produce a business case detailed actions to improve performance including a summary of your analysis
10. specify Specific, Measurable, Achievable, Realistic, Time-bound (SMART) actions to maintain and improve on customer service performance
11. brief your team members on the actions they need to take to improve customer service performance
12. organise resource changes to improve customer service performance when required
13. organise coaching or training to improve team members performance where development needs have been identified
14. adjust customer service performance targets to keep them challenging and achievable
15. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Manage customer service performance

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### Knowledge and understanding

*You need to know and understand:*

1. the methods used to collect metrics on customer service operations performance
2. the techniques for interpreting customer service performance metrics to identify broad patterns
3. the importance of further investigation of any questions that your interpretation of metrics raises and the approaches that you can use
4. the importance of interpreting metrics related to specific services and products as well as overall customer service performance
5. the sources of benchmarks targets, standards and agreed tolerances for your organisation's customer service performance
6. how to identify patterns and trends in customer service performance metrics
7. the techniques used to compare customer service performance metrics with your organisation's quality monitoring results
8. the different types of resources that support customer service performance and how to review and calculate any changes required to deliver improvements
9. how to write a business case, what should be included and your organisation's preferred format
10. the types of actions that will improve customer service performance and how to write them using the Specific, Measurable, Achievable, Realistic, Time-bound (SMART) model
11. the importance of briefing your team members about the role that they play in improving customer service performance and gain their commitment to the actions you have specified
12. the potential resource changes that may be required and how to secure them
13. the methods of coaching and training that can improve team members customer service performance and how to access this in your organisation
14. the ways that you can check that targets are challenging and achievable and how to adjust them
15. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Manage customer service performance

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| <b>Originating Organisation</b> | Instructus   |
| <b>Original URN</b>             | CFACSD20   |
| <b>Relevant Occupations</b>     | Customer Service Occupations   |
| <b>Suite</b>                    | Customer Service   |
| <b>Keywords</b>                 | Management; customer service performance; metrics; ratings; measuring; performance measures; benchmarking; targets; identify trends; identify patterns; monitor outcomes; customer service; contact centres; |

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## Overview

This standard is part of the customer service competence area related to Customer Service Management. It includes developing customer service social networks. It covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Your organisation delivers aspects of its customer service activities using social media platforms. You use social media to deliver customer service both proactively and reactively. You establish and maintain a presence on the social media platforms used by your organisation. You deal with customers using the platforms so that a social media community is managed that links directly with your organisation.

This standard is for customer service professionals on supervisory or managerial levels who develop customer service networks using social media platforms as important channels of communication.

## Performance criteria

*You must be able to:*

1. identify the social media platforms used by your organisation's customers
2. research the ways that your organisation and others currently use social media platforms to provide customer service
3. draw up a profile of how your existing and potential customers use social media platforms
4. identify social media communities that are relevant to your organisation's customer services and products
5. define profiles for social media communities that match your organisation's services and products
6. recommend improvements to your organisation's use of social media to provide customer service
7. plan to use social media platforms to deliver customer service based on your research
8. allocate roles and responsibilities for making improvements to customer service provided using social media
9. contribute to the development of procedures for providing customer service to customers using social media communities
10. contribute to the implementation of improvements to customer service using social media
11. monitor improvements to customer service using social media
12. review customer service using data collected through monitoring to identify further improvements
13. agree improvements to customer service using social media with decision makers
14. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. the mainstream and niche social media platforms used by your organisation's customers
2. how different organisations use social media platforms to provide customer service
3. how to profile customers use of different social media platforms
4. how to match social media communities to your organisation's customer services and products
5. the importance of making an impact when communication on social media
6. the methods used to recommend improvements to the use of social media for customer service delivery
7. the importance of teamwork when implementing customer service improvements using social media
8. how to devise and present procedures for providing customer service using social media
9. your role and responsibilities for implementing improvements to customer service using social media
10. how to select monitoring data and observe improvements to customer service using social media
11. how to monitor the effects of improvements to customer service when observing social media data
12. the metrics available to monitor improvements to customer service using social media
13. the decision maker in your organisation with authority to agree improvements to customer service approaches using social media
14. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Develop customer service social networks

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| <b>Original URN</b> | CFACSD22 |
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| <b>Relevant Occupations</b> | Customer Service Occupations |
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| <b>Suite</b> | Customer Service |
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| <b>Keywords</b> | social media marketing; development and improvement; social media platforms; customer service; team working; analysis; problem solving |
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## Overview

This standard is part of the customer service competence area related to Customer Service Management. It includes developing personal performance through delivering customer service. It covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Delivering customer service presents you with many opportunities for learning and for developing your personal skills. You develop your personal skills at the same time as improving your customer service performance. You plan to improve your personal performance with your manager or mentor, based on feedback, and then carry out development activities to help you improve in your customer service role.

This standard is for customer service professionals on supervisory or managerial levels who develop personal performance through delivering customer service.

## Performance criteria

*You must be able to:*

1. research the knowledge and skills you require to meet your organisation's standards in your customer service role
2. review your own positive and negative experiences as a customer to empathise with your customers perspective
3. assess your own performance in your customer service role using your organisation's standards
4. gather feedback from your manager and team colleagues about your performance
5. identify your strengths and development areas based on colleagues' feedback and your own self-assessment
6. agree your strengths and development needs with your manager or mentor
7. write personal objectives to maintain your strengths in performing your customer service role
8. produce personal development objectives to improve your performance in your customer service role based on your identified needs
9. create personal development plans including activities and target dates for completing them
10. review your progress towards your objectives with your manager or mentor
11. complete the development activities identified in your customer service personal development plans
12. reflect on your day to day experiences with your customers to develop your customer service performance
13. obtain feedback from your manager and team colleagues about changes that you have made to your performance
14. review and update your customer service personal development plans
15. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. your organisation's standards for your role and the knowledge and skills that you need to meet performance expectations
2. how you can use your own experiences as a customer with other organisations to understand what customers might be thinking and feeling about your service to them
3. how to carry out a self-assessment of your own performance using your organisation's standards
4. the methods used to gather feedback from colleagues and your line manager and the advantages and disadvantages of each method
5. how to respond positively to personal feedback
6. how to analyse the feedback you have received to identify areas of strength and areas that require development
7. how to produce a personal development plan that will build on your strengths and develop areas that need to be improved to deliver customer service
8. your organisation's formal and process for producing personal development plans and what you need to include
9. the importance of using a process of planning, doing and reviewing progress with your manager or mentor for personal development
10. how to review your progress with your manager or mentor and update your development records
11. the methods that can be used to reflect on learning and the approaches that you find most useful
12. how to access sources of information and support for your learning
13. how to obtain personal feedback from your team members and manager that links to your development objectives
14. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

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| <b>Originating Organisation</b> | Instructus  |
| <b>Original URN</b>             | CFACSD3   |
| <b>Relevant Occupations</b>     | Customer Service Occupations  |
| <b>Suite</b>                    | Customer Service  |
| <b>Keywords</b>                 | personal performance; developing skills; improving performance; continuous improvement; improving skills; customer service; contact centres; improve; develop; communication; |

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## Overview

This standard is part of the customer service competence area related to Customer Service Management. It includes promoting continuous improvement. It covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

You are dedicated to the continuous improvement of customer service in your organisation and get involved in organising changes to customer service on an ongoing basis. You identify potential changes, think through their consequences and make them work. Above all, you focus on organising and implementing changes that are sustainable and in the spirit of continuous improvement in customer service.

This standard is for customer service professionals on supervisory or managerial levels who promote continuous improvement.

## Performance criteria

*You must be able to:*

1. plan improvements in customer service based on customer feedback
2. gather feedback from customers to identify opportunities for customer service improvements
3. analyse customer feedback to identify opportunities for customer service improvements
4. discuss the potential consequences of any proposed changes for your customers and your organisation with your team and manager
5. negotiate changes to improve customer service systems with colleagues who have the authority to approve trials or full implementation of changes
6. organise the implementation of approved trials and changes
7. inform colleagues affected by the changes being made about the reasons for them
8. monitor early reactions to changes and make adjustments when required
9. collect and record customer and colleague feedback about the effects of changes
10. analyse and interpret feedback to draw conclusions
11. share your findings on the effects of changes with your team and manager
12. summarise the advantages and disadvantages of the changes
13. use your analysis and interpretation of changes to identify opportunities for further improvement
14. present these opportunities to colleagues who have the authority to make them happen
15. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. how to gather feedback from customers within your organisation's guidelines and the tools and processes that are used
2. how to analyse and interpret customer feedback to identify potential opportunities to improve the customer service your organisation provides
3. the importance of identifying the potential consequences of changes and how to explore these with your manager and team before negotiating changes
4. the different negotiation techniques that can be used to agree trials and full change implementations with colleagues who have authority
5. how to organise implementation of changes within your limits of authority and what you need to consider
6. the importance of developing rationale for changes that are implemented and how to communicate with colleagues who are affected giving reasons
7. the methods used to monitor changes in the initial stages and adjust approaches in response to reactions from customers and customer service colleagues
8. the importance of collecting and recording feedback about the effects of the changes implemented on customers and your organisation
9. the analysis techniques that can be used to draw conclusions from feedback and issues to consider when you are interpreting it
10. the importance of sharing your findings with your manager and team and how to do this
11. the organisational benefits of summarising the advantages and disadvantages of changes that you have implemented
12. how to make a business case to others to bring about change in the services or products you offer
13. how developments in communication channels such as social media present opportunities for customer service improvements
14. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Promote continuous improvement

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**Original URN** CFACSD9

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** identifying changes; organising; continuous improvement; customer service; contact centres; developing; improving; communication; problem solving; work with others; teamwork; giving information; receiving information

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## Overview

This standard is part of the customer service competence area related to Customer Service Management. It includes improving customer relationships and services. It covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

To improve relationships with your customers you deliver consistent and reliable customer service. You make your customers feel that you want to provide great service and make efforts to exceed their expectations. You encourage loyalty from external customers or longer-term service partnerships with internal customers. You are proactive with your customers and negotiate between your customers and your organisation to find ways of meeting your customers' expectations. The people you work with to improve customer service may include team members; colleagues; suppliers; service partners; supervisors; managers; and team leaders. You communicate with each other and agree how you can work together to improve service. You must also monitor your own and the team's performance and change the way you do things to improve customer service.

This standard is for customer service professionals on supervisory or managerial levels who improve customer relationships and services.

## Performance criteria

### *You must be able to:*

1. select and use methods of communication that meet your customers' expectations
2. contact customers to update them about unexpected circumstances
3. adapt your communication style to respond to individual customers' feelings
4. monitor your interactions with customers using your organisation's information channels
5. negotiate to meet your customers' expectations within your organisation's guidelines
6. explain the reasons why customer expectations cannot be met when necessary
7. identify alternative solutions for your customers either within or outside your organisation
8. identify the costs and benefits of the alternative solutions to your organisation and to your customers
9. negotiate and agree solutions that balance the needs of your customers and your organisation
10. identify opportunities to exceed your customers' expectations
11. take action to exceed your customers' expectations within the limits of your own authority
12. contribute ideas for improving your organisation's customer service
13. identify how you can personally improve customer service and confirm this with your manager
14. collaborate with your team to improve customer service and keep your commitments
15. monitor your own performance in delivery customer service to identify improvements
16. work with your team to collect information on the team's customer service performance
17. agree actions with your team to improve customer service collaboration
18. improve customer service performance by implementing the agreed team actions
19. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. the methods of communication for dealing with your customers and how to select and use them to meet customers' expectations
2. how to identify when unexpected circumstances arise or when you require more information from your customers to provide services and products
3. how to identify customers feelings during interactions and adapt your communication style to respond to them
4. how to monitor information about your interaction with customers from available communication channels including internet communication channels and social media platforms
5. how to negotiate with your customers to meet their expectations whilst balancing the needs of your organisation
6. the communication techniques used to inform customers that you cannot meet their expectations
7. the internal and external providers who can delivery alternative solutions to your customers
8. how to assess the costs and benefits to your customer and your organisation of any unusual agreement you make to provide alternative solutions
9. the importance of customer loyalty and/or improved internal customer relationships to your organisation
10. the methods that you can use to exceed customer expectations and the implications of using them
11. the colleagues who are involved either directly or indirectly in the delivery of customer service in your organisation and their roles
12. the roles of others outside your organisation who have an impact on your services or products
13. the skills used to collaborate with colleagues to deliver service improvements
14. how to assess your own performance, plan to improve and monitor your progress
15. what the goals or targets of your organisation are in relation to customer service and how these are set
16. how your organisation and team identify actions to implement improvements in customer service
17. the actions that can be taken to improve customer service performance

18. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out



## Improve customer relationships and services

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| <b>Originating Organisation</b> | Instructus   |
| <b>Original URN</b>             | CFACSB11, CFACSD8  |
| <b>Relevant Occupations</b>     | Customer Service Occupations   |
| <b>Suite</b>                    | Customer Service   |
| <b>Keywords</b>                 | Relationships; customer service; reliable; exceed expectations; external customer; internal customer; loyalty; service partnerships; customer service; communication; problem solving; behaviours; teamwork; contact centres; developing; improving; |

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## Overview

This standard is part of the customer service competence area related to Customer Service Management. It includes gathering, analysing and interpreting customer feedback. It covers planning, organising and controlling customer service operations. It includes customer service behaviours and processes that have most impact on the customer experience during customer service delivery. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

You improve customer service by being fully aware of customer wishes and expectations. You seek structured feedback from your customers about their experiences of your organisation's services or products. Important customer feedback can also be found on social media platforms, where customers and influencers exchange opinions about your organisation's customer service. These opinions effect your organisation's reputation, so you monitor and review social media content to identify trends. You also use social media content and customer feedback to make suggestions for improvements to customer service and changes in the way your organisation deals with its customers.

This standard is for customer service professionals on supervisory or managerial levels who gather, analyse and interpret customer feedback to improve customer service.

## Gather, analyse and interpret customer feedback

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### Performance criteria

*You must be able to:*

1. identify the methods available for collecting customer service feedback
2. evaluate the costs and benefits of each method for collecting customer feedback
3. select methods for collecting customer feedback from different sources
4. develop a plan to collect information from customers about customer service
5. apply your chosen methods to collect customer feedback
6. search social media platforms for customer feedback
7. confirm that customer service feedback posted on social media is accurate and valid
8. classify and collate customer service feedback from social media platforms
9. collate customer service feedback about responses to specific requests on social media
10. monitor feedback collection to check that it focuses on your chosen customer sample and customer service
11. record data using your organisation's software ready for the analysis and interpretation stage
12. collate data collected from customers to identify patterns and trends in customer service
13. perform calculations to summarise patterns and trends in the data collected
14. present your analysis in your organisation's required format
15. interpret the meaning of the data by linking your analysis with knowledge of your organisation's services or products, and processes
16. make recommendations for changes in customer service in response to the views of your customers
17. use customer feedback to develop customer relationships
18. respond to customers service feedback through social media platforms when required
19. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. the advantages and disadvantages of collecting customer feedback through different methods, including written questionnaires; telephone, by interview; using focus groups; internet; e-mail; and social media
2. the importance of validating feedback submitted through electronic channels such as social media to ensure that it represents genuine customer opinions
3. the random sampling techniques that can be used to select customers to provide feedback and how to avoid bias in non-random samples
4. the principles of questionnaire design the software that your organisation uses
5. the principles of interviewing customers and the type of data that this method generates
6. how to calculate the costs of developing and implementing a customer survey
7. how to implement customer surveys
8. how to search social media platforms for customer service feedback posted by customers
9. how to ensure that customer service feedback posted on social media platforms is accurate and valid
10. the techniques for monitoring data collection from different sources
11. how to use your organisation's software to record and analyse customer feedback
12. your organisation's format for displaying and presenting data so that is easy to understand
13. the statistical techniques that can be used to summarise trends and patterns
14. the ways that customer feedback can be used to provide information to customers and develop relationships with them
15. your organisation's procedures for recommending changes in customer service procedures, processes and systems
16. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Gather, analyse and interpret customer feedback

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** gather feedback; analyse feedback; interpret feedback; customer service; contact centres; developing; improving; communication; problem solving; work with others; teamwork; giving information; receiving information;

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## Overview

This standard is part of the customer service competence area related to Customer Service Management. It includes using service partnerships for customer service delivery. It covers planning, organising and controlling customer service operations. It includes customer service behaviours and processes that have most impact on the customer experience during customer service delivery. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Your deliver of customer service relies on teamwork. In many situations, successful delivery of service to end user customers relies on a complete service chain of internal or external customers and internal or external suppliers. You form a series of service partnerships which enable the chain to work efficiently and effectively. You work within the service chain and develop the links that cement key relationships. You communicate with, and understand, the roles of different organisations, departments and individuals for delivery of customer service.

This standard is for customer service professionals on supervisory or managerial levels who use service partnerships for customer service delivery.

## Use service partnerships for customer service delivery

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### Performance criteria

*You must be able to:*

1. define partners involved in the service chain that supplies your end user customers
2. identify the internal and external service partners involved in your organisation's service chain
3. explain how your work with individual service partners contributes to an overall service chain
4. deliver customer service to internal and external customers following the same principles and practices
5. work with internal customers in the service chain to improve service to external customers
6. communicate with internal customers to highlight any aspects of your work that might affect them
7. work with internal or external suppliers in the service chain to improve service to external customers
8. maintain relationships between internal or external suppliers and customers to reinforce how all roles in the service chain contribute to service
9. identify where power and authority exist within the service chain
10. negotiate with internal customers, and internal or external suppliers, to agree service procedures that contribute to customer service
11. develop working relationships with internal customers or suppliers using service level agreements (SLAs)
12. work with colleagues to maintain awareness of the need for team collaboration within the service chain
13. agree with service partners how your work will be prioritised if there is a conflict of interest between the demands of internal and external customers
14. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. the teams, colleagues and external service partners that are involved in supplying your end user customers
2. how service partnerships contribute to your customer service role
3. the principles and practices of delivering customer service to internal and external customers
4. the responsibilities and rights that can be built into an internal customer and supplier relationship
5. the advantages and disadvantages of describing a relationship in a service chain as a supplier and customer relationship or a service partnership
6. how to establish your priorities when internal customer demands conflict with external customer demands
7. how to maintain team identity whilst working collaboratively with other teams to deliver customer service
8. how to negotiate successfully with internal customers and external service partners
9. the formal and informal structures of your organisation and how they can influence relationships
10. the methods used to build and maintain relationships with service partners and how to differ your approach to meet different communication styles
11. how to use the available sources of information about external service partners and social media to develop positive working relationships
12. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out



## Use service partnerships for customer service delivery

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| <b>Originating Organisation</b> | Instructus |
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| <b>Relevant Occupations</b> | Customer Service Occupations |
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| <b>Suite</b> | Customer Service |
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| <b>Keywords</b> | service partnerships; service chain; internal customer; external customer; suppliers; build relationships; understanding; customer service; communication; problem solving; work with others; giving information; teamwork |
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## Overview

This standard is part of the customer service competence area related to Customer Service Management. It covers planning, organising and controlling customer service operations. It includes customer service behaviours and processes that have most impact on the customer experience during customer service delivery. Remember that customers include everyone to whom you provide products and services. 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. You plan and supervise customer service activities, closely monitoring and controlling customer service operations. When problems occur, you deal with them in a way that leaves your customer with a positive impression of your organisation.

This standard is for customer service professionals on supervisory or managerial levels who plan, organise and control customer service operations in their organisation.

## Performance criteria

*You must be able to:*

1. analyse customers' expectations of customer service
2. define the services and products available to meet those expectations
3. create customer service delivery plans and evaluation criteria
4. agree plans, budgets and targets to deliver customer service with decision makers
5. identify any contingencies that may occur and assess their risks
6. develop plans to deal with contingencies
7. negotiate the staff and other resources that you need to implement your customer service delivery plans
8. develop specific, measurable and realistic targets for the staff who deliver customer service
9. brief staff on their objectives and targets
10. collect feedback from customers and staff about customer service operations
11. evaluate how the agreed outcomes and processes are being achieved
12. modify your plans for customer service operations based on feedback and your evaluation
13. collect information about problems that occur
14. assess the impact of problems on customers
15. identify the causes of problems and possible solutions
16. evaluate possible solutions to resolve problems against customer expectations and organisational needs
17. select and implement an acceptable solution with the minimum possible disruption to customers
18. monitor the implementation of the solution against the agreed criteria
19. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. how to develop plans for customer service operations and what they should include
2. how to identify and work within allocated budgets and time targets for customer service operations
3. how to negotiate the resources you need to deliver your plans
4. the types of contingencies that may occur during customer service operations, how to assess their risks and plan how to deal with them
5. the types of monitoring methods you can use to organise and control customer service operations
6. the criteria used to evaluate the effectiveness of customer service operations
7. how to develop specific, measurable and realistic objectives and targets for teams and individuals
8. the importance of briefing staff on their roles and responsibilities and how to do this
9. how to check that staff understand that is required of them to deliver customer service
10. the importance of monitoring the quality of your customer service operations and the impact this has on your organisation
11. the types of problems that are likely to occur in your customer service operations and how to plan for dealing with these
12. the processes and systems that your organisation used for dealing with problems
13. the importance of liaising with customers and colleagues about problems and possible solutions
14. how to identify and evaluate possible solutions to problems that occur
15. the different sources of information available, including the internet and social media, and the opportunities they present for monitoring information about customer needs
16. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Plan, organise and control customer service operations

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** Delivery; customer loyalty; monitoring; solving problems; positive impression; customer service; communication; problem solving; work with others; giving information; teamwork; receiving information

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## Overview

This standard is part of the customer service competence area related to Customer Service Management. It covers managing customer service. It includes the language and concepts of customer service as well as the organisational context and the external environment in which you work. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Customer service management responsibilities generally involve a set of skills, knowledge and understanding that might be expected of any manager. However, the nature of customer service means that, if you have specific customer service responsibilities, there are further skills and knowledge required. This standard covers the key principles of customer service that influence how it is managed and the links between your management responsibilities and those key principles. The standard also recognises that knowledge and understanding of customer service principles and systems as a manager may not be as detailed as those required in a delivery role. Instead, your knowledge and understanding must relate to a more strategic appreciation of the principles of customer service.

This standard is for customer service professionals on supervisory or managerial levels who monitor and manage customer service.

## Performance criteria

*You must be able to:*

1. manage the overall customer service for your organisation's products and services
2. build a customer service culture in your organisation
3. identify and maintain resources to support customer service delivery
4. supervise staff to deliver customer service to your organisation's required standards
5. train and develop your staff to build their knowledge and skills in customer service
6. develop staff skills in the delivery of customer service
7. contribute to the development of customer service policies, culture and ethics in your organisation
8. monitor levels of customer satisfaction with your products and services
9. evaluate options for technology that will improve customer service delivery
10. carry out risk assessments when dealing with customer service problems
11. mitigate risks with customer service problems and review the mitigation methods on a regular basis
12. demonstrate leadership in a customer service role
13. recruit staff with the customer service skills specified by your organisation
14. monitor and maintain customer service in your organisation
15. recommend improvements to customer service in your organisation
16. establish a network of customer service contacts
17. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Knowledge and understanding

*You need to know and understand:*

1. your role and responsibilities in relation to your organisation's services and products, customer expectations and customer satisfaction
2. how organisational systems, teams and individual staff deliver customer service in your organisation
3. the ways that organisational systems balance customer satisfaction and financial considerations
4. how staff knowledge, skills, attitudes, training, experience and personality contribute to customer service
5. the options for monitoring customer service performance and the benefits and drawbacks of each option
6. the use of customer service as a competitive tool by the commercial sector and its use as a contribution to best value in the public or third sectors
7. the key features of the customer service culture in your organisation and how to build and maintain this
8. how risk assessment can be used to deal with customer service problems
9. the methods of mitigating the risks and continuous review of these
10. the current options available for using technology to improve customer service delivery
11. the ways that an organisation can continuously improve its customer service
12. how to recruit customer service staff for your organisation against a job and person specifications
13. the options for training, development and achievement of qualifications by your organisation's staff in customer service and the benefits and drawbacks of each option
14. the importance of monitoring and maintaining customer service delivery in your organisation and the processes that are used
15. the ways you can promote continuous improvement within your organisation
16. the importance of establishing a strong network of contacts with similar interests in customer service
17. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out



## Manage customer service

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**Relevant Occupations** Customer Service Occupations

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**Suite** Customer Service

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**Keywords** customer service management; key principles; knowledge; understanding; strategic principles

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## Overview

This standard is part of the customer service competence area related to Customer Service Management. It covers using customer service as a competitive tool. It includes customer service behaviours and processes that have most impact on the customer experience during customer service delivery. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Customer service contributes to your organisation's competitive position. Customers have choices about the services or products they use and who supplies them. Often the technical features and cost of the service or product are almost identical. If this is the case, the quality of the customer service offered influences which supplier the customer chooses. You ensure that your organisation uses the competitive advantage that can be gained from offering superior customer service. You use customer service as a tool to compete effectively with other providers of similar services or products.

The standard is for customer service professionals on supervisory or managerial levels who use customer service as a competitive tool.

## Use customer service as a competitive tool

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### Performance criteria

*You must be able to:*

1. develop your own and colleagues' understanding of the services or products offered by your organisation
2. compare your organisation's services and products with your competitors
3. present an image to your customers that reinforces your organisation's service
4. role-model customer service as a competitive tool to colleagues
5. encourage customer service actions that create and develop customer loyalty
6. take actions to provide customers with added value within your organisation's services
7. encourage colleagues to provide customers with added value
8. explain the extra benefits that your organisation gives to customers in comparison to your competitors
9. offer additional technical advice to customers to enhance customer service
10. identify the financial implications of any added value actions that you or your colleagues might offer
11. meet customer service targets to ensure that your customers see the benefits of dealing with your organisation
12. re-direct customers to other service providers when their expectations cannot be met by your organisation
13. remind customers about services and products they have previously shown an interest in
14. offer complementary services or products based on customer satisfaction and interests
15. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Use customer service as a competitive tool

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### Knowledge and understanding

*You need to know and understand:*

1. the services or products offered by your organisation
2. the services or products offered by your organisation's competitors
3. your role and responsibilities for using customer service as a competitive tool
4. your organisation's guidelines for using customer service as a competitive tool and how to role-model this to colleagues
5. the factors that influence customers opinions and beliefs about your organisation's services and products, to feel that they are getting value for money
6. how to research and compare services or products with your organisation's competitors, including using the internet and social media sources
7. the features and benefits of services or products that are seen by customers as added value
8. how to add non-chargeable items for customers to impress them and develop their loyalty
9. how to portray a positive image that reinforces your organisation's competitive position
10. your organisation's customer service targets
11. how to avoid causing offence when re-directing customers to other service providers
12. the cost implications of added value actions to improve the organisation's competitive position
13. the complementary services or products that may be of interest to your customers such as repeat orders and add on services
14. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

## Use customer service as a competitive tool

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| <b>Original URN</b>             | CFACSA14  |
| <b>Relevant Occupations</b>     | Customer Service Occupations  |
| <b>Suite</b>                    | Customer Service  |
| <b>Keywords</b>                 | Competition; services; products; customer service; communication; problem solving; behaviours; work with others; team working |

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