

Occupation Profile

Providing Customer Services Modern Apprenticeship at SCQF Level 6

Approved by: Customer Service Technical Expert Group

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Purpose:

This occupation profile consists of 25 work situations and NOS routinely carried out in customer service roles. This provides all the performance requirements and knowledge and understanding requirements apprentices need to demonstrate competence in the occupation.

Meta-skills

Meta-skills sit alongside and complement technical knowledge, skills and behaviours. As technology, society and the way we work change at an ever-increasing pace, meta-skills are the over-arching and future-focused attributes that enable other skills to be developed through consideration, reflection and implementation.

Meta-skills support improved performance and productivity, greater adaptability and resilience to change. For apprentices, meta-skills are a critical asset, supporting their ability to cope and excel in the face of change, to solve problems, to collaborate with others and to create successful futures. There are three categories, each with four meta-skills.

Managing yourself - focus, integrity, adaptability and initiative

Connecting with others - communication, feeling, collaboration and leadership

Interacting with change - curiosity, creativity, sense-making and critical thinking



Developing meta-skills in Customer Service, Retail and Travel Apprenticeships

Supported by their employer, mentor and learning provider, apprentices should consider, practice and reflect on their use of meta-skills during their apprenticeship, building those skills to enhance their personal effectiveness in their present role and their future careers.

Here are some examples of when an apprentice might use Meta-skills:



Managing yourself

A clear **focus** is required when dealing with a complex problem relating to a customer booking; **integrity** is essential when providing honest and constructive feedback to colleagues; **adaptability** is key to dealing with changes and unexpected or challenging situations arising from customer complaints; and using **initiative** is critical to professional development when seeking to improve and gain new skills.



Connecting with others

Clear and effective **communication** with customers is one of the most significant aspects of roles across these apprenticeships; **feeling** and resilience is needed to show empathy and understanding when dealing with colleagues; skills in **collaboration** are vital to career development as working well as part of a team or business can help to improve individual and collective performance; and strong **leadership** qualities are required to give colleagues clear directions when working in a business environment.



Interacting with change

A keen sense of **curiosity** is a critical asset when asking questions about a new system or technique; **creativity** is fundamental to working with customers as it enables alternatives or solutions to be found; **sense-making** comes into play when helping a colleague to use a new or unfamiliar payment or information management system; and **critical thinking** is required to solve unexpected problems in the working environment.



Mandatory work situations

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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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Version Number	1
Date Approved	22 Feb 2021
Indicative Review Date	01 Mar 2026
Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	CFACSA8, CFACSA9
Relevant Occupations	Customer Service Occupations
Suite	Customer Service
Keywords	Communicating; giving respect; personal touch; customer service; communication; problem solving; behaviours; work with others; team working; balancing time; relationship building; feelings; adding value; appreciation

Goal of work situation:

To develop meta-skills and personal practice through self-evaluation, agreeing objectives, reflecting on practice, and actively learning to improve own performance in line with organisational requirements.

Brief outline:

This is about developing meta-skills and personal practice. This involves reflecting on and learning from practice; acting on feedback; agreeing and working towards own objectives for continuous personal and professional development. Individuals will be supported in their development, usually by their line manager.

Performance requirements

1. Identifying meta-skills and role specific skills regularly used in own work to assess strengths and improvement needs for personal and professional development
2. Discussing and agreeing SMART objectives for personal and professional development and to achieve business objectives
3. Discussing and agreeing appropriate development activities to improve own performance and to achieve business objectives
4. Completing development activities within agreed timescales to support and progress own performance
5. Acting on feedback to improve own performance and development
6. Reflecting on performance, meta-skills and specific skills developed in your role to identify and agree future development needs
7. Completing mandatory training in line with organisational requirements
8. Completing documentation required for personal and professional development in line with organisation policy and procedures

Knowledge and understanding requirements

1. The purpose and importance of meta-skills including their definitions and how they relate to own work
2. The importance of personal and professional development within own organisation and role
3. How to use reflective practice to identify gaps in role specific knowledge, skills and meta-skills
4. How to participate effectively in performance reviews
5. How to discuss and agree SMART objectives – Specific, Measurable, Achievable, Realistic, Time-bound
6. The importance of business and personal objectives in own development
7. Sources of up-to-date and appropriate information to support own development
8. The importance of maintaining well-being in own role and where to get support
9. How to use feedback to develop own skills and knowledge
10. Different learning models and styles and how to use these for own development



Optional work situations

A minimum of **eight** optional work situations/NOS must be achieved

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Goal of work situation:

To allocate and check work of team members to meet organisational work plans.

Brief outline:

This is about assigning and scheduling work to team members and checking on work progress and quality, both during and after completion, to ensure required standards of performance are being met and are in line with organisational policies, procedures and work plans.

Note: Team members refer to individuals working in your area over whom you have supervisory responsibilities.

Performance requirements

1. Reviewing work plans for your area to identify work priorities and required outputs in line with organisational policies and procedures
2. Allocating tasks to team members in line with work plans and organisational policies and procedures
3. Providing clear instructions and guidance to team members to support completion of allocated tasks in line with work plans and organisational policies and procedures
4. Checking progress and quality of work by team members against work plans and quality standards
5. Providing team members with prompt feedback and guidance to maintain and improve performance
6. Providing team members with additional support where needed to enable work to be completed to deadlines and to required quality standards in line with organisational policies and procedures
7. Completing relevant documentation regarding allocating and checking work in line with organisational policies and procedures
8. Collecting and using information on work allocation and checks to support improvement of individual and team performance in line with organisational policies and procedures

Knowledge and understanding requirements

1. Relevant employment regulations, organisational policies, procedures and contract terms and conditions that affect allocation of tasks to staff and work plans
2. How to check staff availability and working hours of team members to allocate tasks appropriately
3. Types and methods of effective communication and when and how to use these
4. How to provide prompt and constructive feedback and guidance to team members
5. Situations and examples where team members require additional support, methods to achieve this and how this can positively impact individual and team performance
6. Relevant methods for motivating team members in your area of responsibility
7. How to complete documentation and collect, record and use information about individual and team performance

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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Validity Current

Status Original

Originating Organisation Instructus

Original URN CFACSC6

Relevant Occupations Customer Service Occupations

Suite Customer Service

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

CFACSD5

Buddy a colleague to develop their customer service skills



Overview

This Standard is part of the Customer Service Theme of Development and Improvement. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

In customer service roles it is often useful to have a 'buddy' relationship with somebody who has more experience of the same customer service situation. If you are asked to buddy a colleague who is learning customer service aspects of their job, you need to approach that responsibility in an organised way. This Standard is about how to be a good buddy by working alongside your colleague and providing them with constructive feedback and support. You do not need to be more senior than your colleague or their supervisor to act as a customer service buddy.

CFACSD5

Buddy a colleague to develop their customer service skills

Performance criteria

Plan and prepare to buddy a colleague

You must be able to:

- P1 agree with your colleague aspects of their work which may benefit most from your buddying support
- P2 your understanding of your colleague's job tasks and responsibilities using reliable sources
- P3 clarify the customer service image and impression your colleague should present in their job
- P4 arrange times when it will be most helpful to work alongside your colleague
- P5 plan details of a buddy session to support your colleague on the job

Support your buddy colleague on the job

You must be able to:

- P6 agree with your colleague where you will be placed near them when buddying them on the job
- P7 ensure your presence when your buddy is dealing with customers does not detract from effective customer service
- P8 carry out customer service tasks in the presence of your buddy colleague to set an example they can follow
- P9 observe your colleague closely to identify what they do well and areas in which they could improve
- P10 discuss each customer transaction briefly when there is time available between dealing with customers to identify approaches that work well and areas for improvement
- P11 praise your colleague on aspects of their work which they have carried out well
- P12 explain to your colleague ways in which they can improve their customer service performance
- P13 make notes on your colleague's strengths and areas for development that you can discuss with them

Provide buddy support off the job

You must be able to:

- P14 arrange suitable times to meet with your buddy colleague when they are not directly engaged with customers
- P15 identify areas of general interest that help to establish rapport with your buddy colleague
- P16 use notes made when observing your colleague to discuss positive and negative aspects of their performance
- P17 agree actions your buddy colleague can take to improve their customer service performance
- P18 offer hints and tips on effective customer service actions to your buddy colleague drawn from your own experience

CFACSD5

Buddy a colleague to develop their customer service skills

Knowledge and understanding

You need to know and understand:

- K1 the tasks in your buddy colleague's job
- K2 areas of the job that benefit most from buddying support
- K3 the customer service image and impression that should be presented in your buddy colleague's job
- K4 the best times at which to work alongside your buddy colleague
- K5 ways to work alongside your buddy colleague without intruding on the customer relationship
- K6 techniques for giving positive feedback and constructive criticism to your buddy colleague
- K7 the importance of establishing an effective rapport with your buddy colleague
- K8 options for actions your buddy colleague can take to improve their customer service performance

CFACSD5

Buddy a colleague to develop their customer service skills

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Indicative review date	January 2016
Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSD5
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Buddying; colleagues; develop skills; relationships; learning; working together; constructive feedback; customer service; contact centres; improve; develop; communication; problem solving; behaviours; work with others; teamwork; giving information

Goal of work situation:

To support the development of individuals through identification of the skills, knowledge and competencies required to achieve objectives and goals, and supporting them to fulfil their potential.

Brief outline:

This is about developing individuals to meet objectives and plans within your own area of responsibility. This involves establishing current levels of knowledge and skills and supporting the development of individuals to meet the planned requirements.

Performance requirements

1. Identifying the knowledge, skills and competencies needed to deliver objectives and plans for own area of responsibility
2. Reviewing the existing capacity and capability within own area of responsibility to meet identified knowledge skills and competencies required
3. Identifying opportunities for individuals within own area of responsibility to develop their careers
4. Undertaking learning and development needs analysis for individuals to help them understand how they can develop within their roles
5. Supporting individuals to develop personal learning and development plans to identify their potential learning and development opportunities
6. Providing access to relevant opportunities for individuals to learn and develop within their roles
7. Monitoring and reviewing individual personal learning and development plans to identify any new learning and development opportunities

Knowledge and understanding requirements

1. What knowledge, skills and competencies individuals need to deliver objectives and plans within own area of responsibility
2. Opportunities for individuals' career development in your area of responsibility
3. How to assess the current knowledge, skills and competencies of individuals and identify gaps and learning and development needs
4. How individuals' appraisals can be used to identify their learning and development needs
5. Sources of advice, guidance and support on learning and development
6. How to identify learning opportunities and how learning and development needs can be fulfilled
7. What the different learning styles are and how they affect learning
8. The importance of taking account of equality legislation, any relevant codes of practice and general diversity and inclusion issues in providing learning and development opportunities for individuals and how to do this
9. How to recognise obstacles to learning and development and provide support to overcome these
10. How to motivate individuals to take responsibility for their own learning and development
11. The principles of effective mentoring and coaching and how to apply these to support individuals with their learning and development
12. How to develop, monitor, review and amend learning and development plans
13. How to evaluate the success of learning and development interventions

CFACSA13

Deal with customers in writing or electronically



Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme 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 you provide a service to. They may be external to your organisation or they may be internal customers.

Some customer service delivery involves communicating with your customer in a way that creates a permanent record either in writing or electronically. This form of communication carries risks and implications that are less likely to apply to a conversation held with your customer face to face or on the telephone. This Standard is all about how written or electronic communication can be made effective and can contribute to excellent customer service.

CFACSA13

Deal with customers in writing or electronically

Performance criteria

Use written or electronic communication effectively

- You must be able to:*
- P1 operate equipment used to communicate in writing or electronically efficiently and effectively
 - P2 ensure that the period of time between exchanges in writing or electronically represents excellent customer service
 - P3 use language that is clear and concise
 - P4 adapt your use of language to meet the individual needs of your customer
 - P5 ensure that the style and tone of your written or electronic communication follows your organisation's guidelines and matches the service offer
 - P6 follow the conventions and accepted practices of the communication channel or electronic platform you are using

Plan and send an effective written or electronic communication

- You must be able to:*
- P7 anticipate your customer's expectations taking account of any previous exchanges you may have had
 - P8 assemble all the information you need to construct the communication
 - P9 plan the objective of your communication
 - P10 format your communication following your organisation's guidelines
 - P11 open the communication positively to establish a rapport with your customer
 - P12 ensure that your customer is aware of the purpose of the communication as early as possible
 - P13 summarise the key point of the communication and any actions that you or your customer will take as a result

Handle incoming written or electronic communications effectively

- You must be able to:*
- P14 read your customer's communication carefully to identify their precise reason for contacting you
 - P15 identify what they are seeking as the outcome of the contact
 - P16 identify all the options you have for responding to your customer and weigh up the benefits and drawbacks of each
 - P17 choose the option that is most likely to lead to customer satisfaction within the service offer
 - P18 summarise the outcome of the communication and any actions that you or your customer will take as a result

CFACSA13

Deal with customers in writing or electronically

Knowledge and understanding

You need to know and understand:

- K1 the importance of using clear and concise language
- K2 the additional significance and potential risks involved in committing a communication to a permanent record format
- K3 the effects of style and tone on the reader of a written or electronic communication
- K4 the importance of adapting your language to meet the needs of customers who may find the communication hard to understand
- K5 your organisation's guidelines and procedures relating to written and electronic communication
- K6 how to operate equipment used for producing and sending written or electronic communications
- K7 the importance of keeping your customer informed if there is likely to be any delay in responding to a communication
- K8 the risks associated with the confidentiality of written or electronic communications
- K9 the conventions and accepted practices of the channel of communication or electronic platform you are using

CFACSA13

Deal with customers in writing or electronically

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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSA13
Relevant occupations	Customer Service Occupations; Arts, Media and Publishing; Librarians and Related Professionals; Crafts, creative arts and design; Quality and Customer Care Managers; Artistic and Literary Occupations; Customer Service Occupations; Ticketing Occupations; Admissions; Box Office; Visitor Services; Booking Office
Suite	Customer Service (2013); Cultural & Heritage Venue Operations; Ticketing
Key words	Writing; letters; emails; records; contact centres; customer service; communication; problem solving; behaviours; work with others; team Working; venue; Ticketing; Customer; Communicate; Box Office; Admissions; Visitor

Overview

This standard is about delivering and evaluating customer service. The customers may be both internal and external to your organisation. It includes identifying customer needs and expectations, providing services to agreed timescales and quality standards and taking action to improve services based on customers' feedback.

It is for professionals in business administration roles who deliver and evaluate customer service.

Performance criteria

You must be able to:

Identify customer needs and expectations

1. build working relationships with internal and external customers
2. identify and confirm customer needs
3. agree timescales and quality standards with customers
4. manage expectations of all customers to make sure they are met

Deliver customer service

5. provide services to agreed timescales and quality standards
6. follow the organisational procedures if agreed timescales are not achieved
7. check customer needs and expectations are met
8. follow the correct procedures to handle complaints in a professional manner and within set timescales

Monitor and evaluate customer services

9. obtain and record customer feedback
10. analyse and evaluate customer feedback
11. take action to improve service to customers
12. follow the relevant legal and data protection legislation in relation to delivering customer service and information handling

Knowledge and understanding

You need to know and understand:

1. the range of products and services offered by your organisation to internal and external customers
2. the principles of customer service
3. the purpose and benefits of delivering customer service that meets or exceeds and customer expectations
4. how to build working relationships with internal and external customers
5. how to manage and meet customer expectations
6. the types of quality standards appropriate to own responsibilities
7. how to meet timescales and quality standards with internal and external customers
8. how to monitor internal and external customers satisfaction
9. the types of problems that internal and external customers may experience and how to process and resolve or refer them
10. the relevant procedures to follow when handling complaints
11. the techniques for collecting and analysing internal and external customer feedback
12. the purpose and benefits of continuous improvement
13. the relevant legal and data protection legislation in relation to delivering customer service and information handling

Deliver and evaluate customer service

Skills

1. evaluating
2. monitoring
3. problem solving
4. questioning
5. listening
6. negotiating

Deliver and evaluate customer service

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Original URN	CFABAC121
Relevant Occupations	Administration Administration and Law, Administration and Secretarial Occupations, Business, Business and related associate professionals
Suite	Business and Administration
Keywords	Business; administration; customer service

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

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

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 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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Originating Organisation	Instructus
Original URN	CFACSC4, CFACSF2
Relevant Occupations	Customer Service Occupations
Suite	Customer Service
Keywords	problem solving; handling problems; difficult behaviours; dissatisfaction; customer service; communication; problem solving; work with others; teamwork; giving information; receiving information services; products

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

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

Developed by Skills CFA

Version Number 1

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Status Original

Originating Organisation Instructus

Original URN CFACSD12, CFACSD21

Relevant Occupations Customer Service Occupations

Suite Customer Service

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

Handling customer complaints

Goal of work situation:

To handle customer complaints successfully to meet customer and organisational needs and requirements

Brief outline:

This is about handling customer complaints in line with organisational policies and procedures. This involves investigating complaints and following internal complaints procedures to ensure complaints are addressed consistently.

Performance requirements

1. Interpreting complaints in line with organisational policies and procedures to understand customer needs and requirements
2. Investigating complaints to establish their validity against organisational complaints procedures
3. Identifying possible options to resolve complaints in line with organisational policies and procedures
4. Identifying advantages and disadvantages of those options identified to resolve complaints in line with organisational policies and procedures and customer needs and requirements
5. Assessing organisational risks of options identified to resolve complaints in line with organisational policies and procedures and own level of responsibility
6. Selecting most suitable options to resolve complaints in line with organisational policies and procedures
7. Reporting findings of complaint investigations internally and to customers in line with organisational policies and procedures
8. Offering customers relevant solutions to complaints in line with organisational policies and procedures
9. Escalating unresolved complaints in line with organisational policies and procedures
10. Sharing complaint information with colleagues in line with legislative and regulatory requirements and organisational

Knowledge and understanding requirements

1. Legislation and regulations and organisational policies and procedures relevant to role and activities being undertaken
2. Organisational complaints procedures and limits of own authority
3. Regulatory definition of complaints in your sector and requirements of complaint handling
4. Why dealing with complaints is fundamental to delivering customer service
5. Techniques for effectively handling customer conflict and how to apply them
6. Organisational timescales for dealing with complaints and the importance of adhering to them
7. How successful handling of complaints presents opportunities to impress customers
8. The importance of considering advantages, disadvantages and risks of any options identified to resolve complaints, and how to do this
9. Organisational approaches to effectively addressing different channels of complaints, including social media and how to apply them
10. When and how to escalate complaints to other colleagues
11. Why it is important to communicate with customers at all stages of complaints
12. Why it is important to record progress and resolutions relating to customer complaints and how to do this

policies and procedures to prevent similar complaints re-occurring

11. Recording progress and resolutions to complaint handling in line with organisational policies and procedures

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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Relevant Occupations	Customer Service Occupations
Suite	Customer Service
Keywords	Relationships; customer service; reliable; exceed expectations; external customer; internal customer; loyalty; service partnerships; customer service; communication; problem solving; behaviours; teamwork; contact centres; developing; improving;

Lead a team to improve customer service

Overview

This standard is about looking at both your organisation and your staffing resources and bringing these together in a constructive way to improve overall customer service. This standard is for hospitality team leaders, first line managers or supervisors.

It costs five times more to attract a new customer than it does to keep an existing one. Excellent service can therefore make the difference between a business surviving and thriving, and that's where great staff offering a customer experience to your organisation's standard is so important.

It's about setting demanding but achievable objectives and giving support and guidance to your team to encourage them to improve their customer service delivery. It's about encouraging team members to make the best use of their abilities and empower them to solve customer problems within clear limits of authority. It's about giving feedback on both great performance and on those occasions where things could be improved.

Perhaps above all, it's about leading by example; having a passion for customer service and sharing this enthusiasm with your colleagues and team so that everyone strives to offer great customer service to your organisation's standard.

When you have completed this standard you will be able to demonstrate your understanding of and your ability to:

- Lead a team to improve customer service

Performance criteria

You must be able to:

1. Treat team members with respect at all times
2. Agree with team members their role in delivering effective customer service
3. Involve team members in planning and organising their customer service work
4. Allocate work which takes full account of team members' customer service skills and the objectives of the organisation
5. Motivate team members to work together to raise their customer service performance
6. Give team members support and direction when they need help
7. Encourage team members to work together to improve customer service
8. Check that team members understand what they have to do to improve their work with customers and why that is important
9. Check with team members what support they feel they may need throughout this process
10. Provide sensitive feedback to team members about their customer service performance
11. Encourage team members to discuss their customer service performance
12. Discuss sensitively with team members action they need to take to continue to improve their customer service performance

Knowledge and understanding

You need to know and understand:

1. The roles and responsibilities of your team members and where they fit in with the overall structure of the organisation
2. How team and individual performance can affect the achievement of organisational objectives
3. The implications of failure to improve customer service for your team members and your organisation
4. How to plan work activities
5. How to present plans to others to gain understanding and commitment
6. How to facilitate meetings to encourage frank and open discussion
7. How to involve and motivate staff to encourage teamwork
8. How to recognise and deal sensitively with issues of underperformance

Lead a team to improve customer service

Behaviours

The following behaviours are provided as guidance to underpin effective performance of a hospitality supervisor

1. You show respect for the views and actions of others
2. You set demanding but achievable objectives for yourself and others
3. You empower staff to solve customer problems within clear limits of authority
4. You encourage and support others to make best use of their abilities
5. You constantly seek to improve performance
6. You give feedback to others to help them improve their performance
7. You work to develop an atmosphere of professionalism and mutual support

Links to other NOS

This standard is linked to all other standards in the Hospitality Supervision and Leadership suite of standards.

Lead a team to improve customer service

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Status Original

Originating Organisation People 1st International Ltd

Original URN PPLHSL5

Relevant Occupations Supervisor, Team Leader

Suite Hospitality Supervision and Leadership

Keywords improve, customer service

Leading meeting agenda items

Goal of work situation:

To lead specific meeting agenda items in line with own role, responsibility and to meet organisational policies and procedures.

Brief outline:

This is about leading on specific agenda items at team meetings. This involves attending meetings to lead on specific agenda items in line with managers expectations.

Note: Meetings may also be called briefings

Performance requirements

1. Checking purpose and agenda of the meeting with organiser in line with organisational policies and procedures
2. Clarifying own objectives for team meetings with meeting organiser in line with organisational policies and procedures
3. Confirming how team meetings will be delivered in line with organiser and organisational policies and procedures
4. Preparing relevant information to support agenda input in line with role, responsibilities and meeting agendas
5. Communicating required information at team meetings in line with role and responsibilities and organisational requirements
6. Responding to queries, before or during meeting, raised in relation to agenda items to clarify understanding
7. Managing time during meetings in line with meeting schedules
8. Reflecting on input to team meetings to support own continuous improvement

Knowledge and understanding requirements

1. Importance of understanding purpose, agenda and objectives of meetings
2. Importance of preparing own input to meetings and how to do this
3. Different ways in which meetings can be delivered, including face to face and digitally, and how to adapt communication styles
4. How to identify relevant information in advance of meetings
5. How to effectively manage agenda timings and the importance of this
6. How to encourage attendees to contribute and participate in meetings and the importance of this
7. Why it is important to reflect on your input to team meetings and how to do this

Overview

This Standard is about maintaining good environmental practice in day to day work activities. You are required to know the content of organisational policies and procedures, identify and report any actual or potential risks, minimise risks and use resources responsibly and know who the people are in your workplace to whom you should report environmental matters. You are also required to identify anything in your job role that could cause harm to the environment.

This Standard is for anyone who is involved in maintaining good environmental practice in day to day work activities.

Performance criteria

You must be able to:

1. seek information from reliable sources on organisational policies and procedures relating to environmental practice
2. remain up-to-date on environmentally-friendly working practices which are relevant to your workplace at all times
3. recycle and dispose of waste in line with organisational procedures
4. use information from reliable sources to identify current working practices and the use of materials, products or equipment which could cause harm to the environment
5. take appropriate action within the limits of your authority to adapt your working practice and use of materials, products or equipment to minimise environmental risk
6. use resources in line with environmental working practice
7. report any differences between legal regulations and workplace instructions and practice to appropriate people at appropriate times
8. report hazards which present high risks to appropriate people without delay

Knowledge and understanding

You need to know and understand:

1. your responsibilities for the environment as defined by legislation and workplace policies and procedures
2. the environmental monitoring requirements of the organisation that apply to your role
3. the particular risks to the environment which may be present in your workplace and/or in your own job role
4. the importance of remaining alert to the presence of hazards to the environment in the whole work place and promptly reporting, risks to the environment
5. the responsible people to whom to report environmental matters
6. organisational arrangements for recycling and disposal of waste
7. safe working practices and procedures for your own job role relating to the control of risks to the environment
8. correct handling instructions for materials which can be hazardous to the environment
9. how to identify misuse of materials, or products which are hazardous to the environment
10. communication methods and techniques
11. suppliers', manufacturers' and workplace instructions for the use of equipment, materials and products which can be hazardous to the environment

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Status Original

Originating Organisation Creative & Cultural Skills

Original URN CCSCV23

Relevant Occupations Cultural Venue Assistant

Suite Cultural Venue Operations

Keywords cultural; venue; operations; environment; environmental; risk

Monitor and solve customer service problems

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

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
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

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

Monitor the quality of customer service transactions

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

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

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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Relevant Occupations	Customer Service Occupations
Suite	Customer Service
Keywords	monitoring quality; customer service transactions; performance ratings; face- to-face; telephone monitoring; online; measure performance; patterns and trends; customer service; contact centres; developing; improving;

Goal of work situation:

To monitor health, safety and security in line with legislative and organisation procedures to protect yourself and others from the risk of harm and injury.

Brief outline:

This is about monitoring the health, safety and security of yourself and others who may be affected by your work. This involves co-operating with your employer to help them to comply with their duties under relevant health and safety legislation. It includes following set health and safety procedures and identifying and assessing unsafe situations in the workplace or during work activities. It also includes being aware of the main risks to health, safety and security in the workplace and suitable control measures or safe systems of work that can be put in place. In the event of incidents and emergencies required procedures must be followed.

Security could include land, buildings, equipment and machinery, stock, resources, personnel and information.

Performance requirements

1. Monitoring that health, safety and security hazards are identified and risks assessed in your area of work in line with organisation procedures
2. Taking required actions in response to identified hazards and risks in line with organisation procedures
3. Checking that control measures put in place to eliminate or reduce risks in own area of work are adhered to in line with organisation procedures
4. Informing others in your work area of the risks and the control measures that have been put in place in line with organisation procedures
5. Monitoring that health and safety regulations, organisation procedures and safe systems of work are followed in own area of work
6. Checking that security is maintained in own area of work in line with organisation requirements
7. Checking that equipment and machinery is used, maintained and stored in accordance with relevant legislation, manufacturers' instructions and organisation requirements

Knowledge and understanding requirements

1. Health and safety legislation and codes of practice, the legal responsibilities of employers and employees and the importance of monitoring these
2. The importance of following health and safety regulations, organisation procedures and safe systems of work
3. The difference between "hazard" and "risk", how to identify hazards and assess risks
4. The importance of regular risk assessment and what actions to take when risks are identified
5. Particular risks associated with your area of work including personal injury, contracting disease, and other physical and mental health problems
6. Effects that work-related accidents and ill health can have on workers and businesses and the importance of minimising these
7. The risks to others from the activities carried out in own area of work
8. How to communicate the findings of the risk assessment and health, safety and security measures to those at risk

8. Reporting and recording incidents and emergencies, including accidents and near misses, in accordance with legal and organisation requirements
9. Monitoring and reporting on the effectiveness of health, safety and security measures in line with organisation requirements
9. The hierarchy of measures to control risks including elimination, substitution, relevant controls, safe systems of work, training/instruction and PPE
10. The importance of good housekeeping in the workplace to maintaining health and safety
11. The importance of monitoring procedures to maintain security in own area of work
12. Key requirements of the regulations relating to the handling, use and storage of potentially hazardous substances
13. The safe methods of preparing, using, maintaining and storing equipment and machinery in accordance with relevant legislation, manufacturers' instructions and organisation requirements
14. Risks of injury associated with lifting and handling and how these can be minimised
15. The suitable clothing and personal protective equipment (PPE) required for work in your industry
16. The importance of regularly checking that PPE and emergency equipment is available and maintained
17. Risks of working in isolation, in remote locations and potentially dangerous situations, and the need to monitor that safe systems of work are followed, including communication and emergency procedures
18. The procedures to follow and actions to take in the event of incidents and emergencies including accidents and near misses
19. Where to obtain information, advice and support in relation to health, safety and security
20. Legislative and organisation requirements for recording and reporting incidents and emergencies, including accidents and near misses
21. Organisation requirements to monitor and report on the effectiveness of health, safety and security measures

CFACSB10

Organise the delivery of reliable customer service



Overview

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

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

CFACSB10

Organise the delivery of reliable customer service

Performance criteria

Plan and organise the delivery of reliable customer service

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

Review and maintain customer service delivery

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

Use recording systems to maintain reliable customer service

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

CFACSB10

Organise the delivery of reliable customer service

Knowledge and understanding

You need to know and understand:

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

CFACSB10

Organise the delivery of reliable customer service

Developed by	Skills CFA
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Version number	2
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Date approved	January 2013
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Indicative review date	January 2016
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Validity	Current
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Status	Original
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Originating organisation	Skills CFA
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Original URN	CFACSB10
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Relevant occupations	Customer Service Occupations
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Suite	Customer Service (2013)
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Key words	Organising; delivery; reliable; resources; systems; support service; customer service; communication; problem solving; behaviours; work with others; team working; giving information; receiving information services; products
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Goal of work situation:

To accurately process customer returns, refunds and exchanges to meet relevant legislative and regulatory requirements according to organisational procedures.

Brief outline:

This is about complying with relevant legislative and regulatory requirements and organisational procedures when processing customer returns, refunds and exchanges of goods or services. This includes checking products and services requiring refunds and exchanges, and accurately completing transactions and recording all relevant information.

Note: Customer also refers to visitor, guest and clients.

Performance requirements

1. Checking type, quantity and condition of items presented for returns, refunds and exchanges in line with organisational policies and procedures.
2. Explaining clearly to customers relevant organisational policies and procedures for returns, refunds and exchanges
3. Dealing effectively with customer complaints and feedback relating to returns, refunds and exchanges in line with organisational policies and procedures
4. Using correct systems to process returns, refunds and exchanges in line with organisational policies and procedures
5. Providing relevant documentation to customers associated with their returns, refunds and exchanges
6. Checking all retained documentation for returns, refunds and exchanges is completed and stored in line with relevant legislative and regulatory requirements and organisational policies and procedures
7. Updating records relating to stock, customer feedback and information in line with relevant legislative and regulatory requirements and organisational policies and procedures
8. Arranging for returned and exchanged items to be sent to relevant areas, departments, suppliers and manufacturers in line with organisational policies and procedures

Knowledge and understanding requirements

1. Organisational policies and procedures, relevant legislative requirements and codes of conduct relevant to customer returns, refunds and exchanges
2. Responsibilities of own role relating to processing returns, refunds and exchanges
3. How to check quantity and condition of items being returned, refunded and exchanged
4. Methods for communicating information about returns, refunds and exchanges to customers in line with organisational policies and procedures
5. How to constructively manage customer comments and feedback and communicate these to colleagues and other departments
6. Correct organisational procedures and systems used for processing returns, refunds and exchanges
7. How to complete relevant documentation for customers during and after processing returns, refunds and exchanges
8. What documentation is retained and where and how to store this
9. Records required for stock control, customer and supplier feedback and information and how to update these
10. How and where to send returned and exchanged items

Promote additional services or products to customers

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.

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

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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Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	CFACSA15, CFACSA5
Relevant Occupations	Customer Service Occupations
Suite	Customer Service
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

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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Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	CFACSD9
Relevant Occupations	Customer Service Occupations
Suite	Customer Service
Keywords	identifying changes; organising; continuous improvement; customer service; contact centres; developing; improving; communication; problem solving; work with others; teamwork; giving information; receiving information

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.

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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Version Number 1

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Validity Current

Status Original

Originating Organisation Instructus

Original URN CFACSB9

Relevant Occupations Customer Service Occupations

Suite Customer Service

Keywords service partnerships; service chain; internal customer; external customer; suppliers; build relationships; understanding; customer service; communication; problem solving; work with others; giving information; teamwork

Goal of work situation:

To use social media effectively to engage and provide customers with excellent customer service.

Brief outline:

This is about engaging with customers through social media platforms to satisfy customers by meeting their needs and requirements, respond to feedback and promote the organisation in line with organisational policies and procedures. This involves monitoring organisation's own social media platforms to support customers' queries and posts.

Performance requirements

1. Scanning social media exchanges to identify relevant customers' interests in line with organisational policies and procedures
2. Checking postings on social media platforms to interpret customers' needs and requirements
3. Responding to direct queries and requests for information through social media communications in line with legislative and regulatory requirements and organisational policies and procedures
4. Explaining services and products offered by own organisation to customers on social media platforms in line with organisational policies and procedures
5. Communicating professionally on social media platforms in line with legislative and regulatory requirements and organisational policies and procedures

Knowledge and understanding requirements

1. Legislative and regulatory requirements, and organisational policies and procedures for communicating with customers through social media platforms
2. Different types of social media platforms used by own organisation and customers and how to use these
3. Different ways to communicate information through social media platforms
4. How to search social media sources for postings by customers
5. How comments on social media platforms and on-line ratings impact brand and organisational reputation
6. Organisational policies and procedures for response times
7. How to identify customers' interests, requests and needs from postings on social media platforms
8. Services and products offered and what information to share on social media platforms
9. How to interpret customers' needs from their tone and approach of postings on social media platforms and why this is important
10. How to respond to relevant positive, neutral and challenging comments from customers on social media platforms
11. How and when to pass on or escalate challenging comments or customer exchanges to colleagues or other departments
12. Organisational policies and procedures for accepted use of social media platforms
13. How to use social media security settings to control access to exchanges with customers and why this is important
14. How to use social media professionally whilst maintaining organisational reputation and brand

Overview

This Standard is part of the Customer Service Theme of Development and Improvement. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

Teamwork is a key component of delivering and improving excellent customer service. The people you work with to improve customer service may include one or more of the following: team members; colleagues; suppliers; service partners; supervisors; managers; team leaders. The delivery of excellent customer service depends on your skills and those of others. It involves communicating with each other and agreeing how you can work together to give more effective service. You need to work together positively. You must also monitor your own and the team's performance and change the way you do things if that improves customer service. This Standard is about how you develop a relationship with others to improve your customer service performance.

CFACSD8

Work with others to improve customer service

Performance criteria

Improve customer service by working with others

- You must be able to:*
- P1 contribute constructive ideas for improving customer service
 - P2 identify what you have to do to improve customer service and confirm this with others
 - P3 agree with others what they have to do to improve customer service
 - P4 co-operate with others to improve customer service
 - P5 keep your commitments made to others
 - P6 make others aware of anything that may affect plans to improve customer service

Monitor your own performance when improving customer service

- You must be able to:*
- P7 discuss with others how what you do affects customer service performance
 - P8 identify how the way you work with others contributes towards improving customer service

Monitor team performance when improving customer service

- You must be able to:*
- P9 discuss with others how teamwork affects customer service performance
 - P10 work with others to collect information on the team's customer service performance
 - P11 identify with others how customer service teamwork could be improved
 - P12 take action with others to improve customer service performance

CFACSD8

Work with others to improve customer service

Knowledge and understanding

You need to know and understand:

- K1 who else is involved either directly or indirectly in the delivery of customer service
- K2 the roles and responsibilities of others in your organisation
- K3 the roles of others outside your organisation who have an impact on your services or products
- K4 what the goals or targets of your organisation are in relation to customer service and how these are set
- K5 how your organisation identifies improvements in customer service

CFACSD8

Work with others to improve customer service

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Relevant occupations	Customer Service Occupations

CFACSD8

Work with others to improve customer service

Suite

Customer Service (2013)

Key words

customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information; services; products