Best Practice Guide
for Customer Service Managers

Trevor Arden & Stephanie Edwards
World Class Organisations acknowledge the key importance of excellent Customer Service. Managers and Team Leaders, equipped with the right skills and understanding, can implement a culture of excellent Customer Service in an organisation, making a real difference for the business.

The Best Practice Guide for Customer Service Professionals is an activity-based improvement programme for Managers and Team Leaders who wish to manage Customer Service effectively and proactively, through motivating and inspiring their teams.

The Guide will help you as a Manager or Team Leader to involve your team in decision making, planning and improving. Moving beyond traditional management styles, where staff are only given responsibility for day-to-day tasks and rarely empowered to take the initiative, this Best Practice Guide shows you how to keep your team engaged every step of the way, realising the organisational prize of World Class Service Excellence.

Key Features:
- Complete guide for Managers and Team Leaders
- Translates Customer Service Strategy into practical steps for teams
- Innovative ideas on how to motivate, inspire and organise teams
- Practical, work-related activities
- Clear, fun and thought-provoking

Rachel Thomas - Director, Supply Chain Academy, Unilever:

“This book is for anyone in a Team Leadership or Management position who is keen to put their customers at the centre of everything they do. Whether you are a new manager or one of long standing, the content is conveyed in a way which makes learning or re-learning fun and encourages you to implement your key changes today.”

“An example from my own personal experience shows how something as simple as ensuring that the first point of contact can answer a customer query results in up-skilling and empowerment for the team, raising collective knowledge and our commitment to one another - as well as to achieving service excellence. The Best Practice Guide for Customer Service Managers shows, in a practical way, how to introduce a wealth of customer focused improvements in teams.”

Authors Trevor Arden and Stephanie Edwards are leading subject matter experts in Customer Service. Their speciality is building and delivering blended, online training programmes in Customer Service for global companies.

Also available:
- Best Practice Guide for Customer Service Professionals
- Online Award for Customer Service Managers
- Online Award for Customer Service Professionals

www.customer1st.co.uk
Best Practice Guide for Customer Service Managers

An activity-based workbook for leaders of teams that strive for service excellence

Trevor Arden & Stephanie Edwards

Customer 1st International Ltd
United Kingdom
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Introduction

Welcome to the Best Practice Guide for Customer Service Managers. It is available in several formats, including e-book and e-workbook. The e-workbook version enables readers to enter their responses to activities and knowledge-checks into Activity Forms, which can then be saved electronically. The completed Activity Forms can be retained as reference documents for work-based improvements, and may also be used to build an e-portfolio, demonstrating the Manager’s or Team Leader’s achievement of the learning outcomes.

The Best Practice Guide also forms the basis of a tutor-led, online course delivered by Customer 1st International (the publisher of the Best Practice Guide), leading to an Accredited Award. For further information on this course, go to www.customer1st.co.uk.

Who is this Best Practice Guide For?

The Best Practice Guide for Customer Service Managers is an activity-based improvement programme for Managers and Team Leaders who wish to manage customer service effectively and proactively - through motivating and inspiring their teams. It focuses on meeting and exceeding customer expectations by placing customers at the heart of all the team does.
The company is widely recognised for its innovative approach to centre management, and its attention to detail in providing a complete solution for retailers. Unicentro delivers solutions for security, customer services, tourist/visitor information and environmental requirements all within its own centre management package. It is currently a popular choice for global retailers wishing to expand their offerings, especially in countries with well-developed retail markets. In addition it focuses as a Business-to-Business (B2B) organisation on helping the smaller retailer to develop their business, through a range of relatively low cost arrangements encouraging new entrants to the retail centre market.

Since it is a B2B company, Unicentro places great importance on managing its customers’ experiences. Every retailer that it does business with is allocated to a regional Customer Relationship Manager, who delivers a well developed set of customer relationship management processes and performance management package.

**GCU Finance**

GCU is a financial services company that offers personal and corporate banking to customers across Europe, Africa and Asia. Formed from a South African online bank’s acquisition of a European finance house in 2001, it has been successful in providing a customer focused set of financial services.

The bank has its global headquarters in Johannesburg, with regional centres in Amsterdam, Paris, Lagos, Tokyo and St Petersburg.

**From Learning to Action**

The Best Practice Guide for Customer Service Managers will help you to track your own progress and improvements. Each module includes an opportunity to update your Team Balanced Scorecard, together with a Team Action Plan and Progress Record. These activities are designed to focus you on making any changes needed straight away, so that your learning results in concrete improvements in your team - driving your organisation towards world class service excellence.

**Confirming Your Learning**

All of the nine modules include a multi-choice Knowledge-Check consisting of five questions. Each Knowledge-Check allows you to test the progress you have made with your learning programme. You should carry out the self assessment once you have finished going through the module, including all the activities. You will find the answers to the self assessments towards the end of this Best Practice Guide.
0.3 Aims

The aims of the Best Practice Guide for Customer Service Managers are to:

- Introduce participants/readers to the basic principles of managing customer service
- Prepare participants/readers for team leading and management in their sector
- Enable participants/readers to plan and implement an effective service management programme designed to deliver customer service excellence

0.4 Learning Outcomes

The Learning Outcomes for each module are shown below.

<table>
<thead>
<tr>
<th>Learning Outcomes for Module 1</th>
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<tbody>
<tr>
<td>• Identify the main components of excellent customer service</td>
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<tr>
<td>• Demonstrate an understanding of the importance of customer service to an organisation’s reputation and success</td>
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<tr>
<td>• Understand the role of the Manager or Team Leader in leading a team to achieve excellent customer service</td>
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<tr>
<td>• Identify rules, including legislation, codes of practice and organisational procedures that should be followed by a customer service team</td>
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<thead>
<tr>
<th>Learning Outcomes for Module 2</th>
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<tr>
<td>• Understand the purpose of an organisation’s Mission, Vision and Objectives</td>
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<tr>
<td>• Understand the function of an organisation’s Customer Service Strategy</td>
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<tr>
<td>• Recognise how individual and team performance objectives can be derived from overall organisational objectives for customer service</td>
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<tr>
<td>• Identify a range of effective methods of communicating objectives in a team</td>
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<thead>
<tr>
<th>Learning Outcomes for Module 3</th>
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<tr>
<td>• Recognise the distinguishing features of a Customer Focused Team</td>
</tr>
<tr>
<td>• Distinguish between internal and external customers</td>
</tr>
<tr>
<td>• Recognise effective methods of gathering and using feedback from customers</td>
</tr>
<tr>
<td>• Understand how Service Standards are used to help in the delivery of excellent customer service</td>
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</table>
# Learning Outcomes for Module 4

- Recognise the key features of a customer focused approach to the organisation of human resources in a team
- Identify the key features of Emotional Intelligence in relation to customer service
- Identify appropriate organisational structures for a customer service team
- Recognise the importance of systems and processes for the delivery of excellent customer service

# Learning Outcomes for Module 5

- Identify key features of communication in a customer focused team
- Recognise how motivation can be achieved in a team
- Understand how empowerment and delegation can be used by Managers or Team Leaders to contribute to the delivery of excellent customer service
- Recognise the key aspects of equality and diversity that impact upon customer service
- Recognise how reward and recognition arrangements in a team can contribute to the delivery of excellent customer service

# Learning Outcomes for Module 6

- Understand how to listen to customers in order to identify potential and actual problems
- Identify the key steps to defusing potentially difficult situations
- Identify appropriate action to resolve customer service problems
- Understand the importance of learning from customer service problems

# Learning Outcomes for Module 7

- Identify the main features of change in an organisation
- Identify typical barriers to Change
- Understand key tactics to assist a Manager or Team Leader in achieving desired changes
- Show an understanding of the importance of Service Partnerships in a team delivering excellent customer service

# Learning Outcomes for Module 8

- Understand the role of innovation in helping a team to deliver excellent customer service
- Recognise the importance of keeping to the rules when improving customer service
- Understand how technology may be used to improve service for customers
Learning Outcomes for Module 9

- Recognise the importance of Leadership in inspiring teams to deliver excellent customer service
- Show an understanding of an effective model for Personal and Professional Development of customer related skills and knowledge

0.5 Your Personal Objectives

WORK-BASED ACTIVITY

Your Personal Objectives

To start with, think about what you hope to get out of this development programme. Where in your Customer Service Management or Team Leading role do you need to improve your own understanding and skills? Decide on your personal objectives which will enable you to improve your performance as a Customer Service Manager or Team Leader. Write in the space below up to five personal objectives for your development programme:

1
2
3
4
5

0.6 Progression to Further Learning

This Best Practice Guide for Customer Service Managers will equip you with the knowledge and understanding you need to lead and build a customer focused team. Once you have completed it, you could consider moving onto further learning and qualifications:

- An online course in Implementing a Customer Service Strategy
- A Certificate or Diploma in Management, enhancing your understanding of Management concepts and skills
- A vocational qualification relevant to your specific employment sector
1 Managers and Customer Service Excellence

Welcome to Module 1 of the Best Practice Guide for Customer Service Managers. In this module we look at the importance of excellent customer service and what it comprises. You will consider the role of the Manager or Team Leader in contributing to the success of your organisation, through the delivery of excellent customer service.

1.1 Learning Outcomes

On successful completion of this module you should be able to:

- Identify the main components of excellent customer service
- Demonstrate an understanding of the importance of customer service to an organisation’s reputation and success
- Understand the role of the Manager or Team Leader in leading a team to achieve excellent customer service
- Identify rules, including legislation, codes of practice and organisational procedures that should be followed by a customer service team

1.2 Who are Our Customers?

Let’s be clear from the start who we mean by “customers.” They could be any of a range of people or organisations.

- **External Customers** - individuals, end-users or consumers of a product or service - these are outside your own organisation
- **Internal Customers** - individuals, departments or sub-groups within your own organisation
- **Corporate Customers** - organisations that your own organisation does business with - such as suppliers, distribution companies or transport providers (These are also external customers, as they too are outside your own organisation)
Customers’ Perceptions

As a Manager or Team Leader, you are probably already aware of the importance of “what the customer thinks.” In other words, one of your key objectives for your team should be to maintain or improve the customer’s perception of the services received from the team and the whole organisation.

Customers make judgements about an organisation based upon their experience of that organisation, its products, its service and its people. A single customer’s experience may be only a brief encounter, perhaps when a product is being ordered from a supplier, bought in a shop, by telephone or perhaps ordered through a website. Whatever the situation, what counts is the Customer Experience - the service that the customer perceives, rather than the service the organisation thinks it has delivered. The best way of organising your team around customers is to be in touch with the Customer Experience.

1.3 What Does Customer Service Comprise?

Now we need to look at Customer Service and what it actually comprises. Here is a definition.

**DEFINITION**

Customer Service

Customer Service is the sum total of what an organisation does to meet customer expectations and produce customer satisfaction.

Think about the definition and relate it to your own and your team’s work with customers. The actual services that a customer receives will vary from one situation to another. The combination of services that you deliver to customers depends upon a number of factors:

- The core product or service being delivered
- The organisation delivering the service
- The individual delivering the service
- The customer receiving the service
- The specific point or stage in the Customer Transaction that has been reached

Service is provided at various Touch-Points during a customer’s relationship with an organisation - this relationship could last for years, especially for your organisation’s valuable, long-standing customers. In addition, there are different aspects of service provided at different times during a customer transaction, such as before, during and after a purchase.
This applies to internal customers, as well as external customers. If, for example, a service is being provided to an internal customer this could be before, during or after a particular task was set.

Remember also that the service itself might actually be provided by different means.

- Service can be provided by a person, such as a customer orders assistant, a logistics operator or a retail assistant
- Service can be provided by automated systems such as E-Commerce (or self-service) websites, or automated telephone response systems

Some customers may prefer a human interaction to an automated or self-service interaction. Organisations need to choose carefully the type of interaction they are going to provide at these touch-points - and this will depend on costs to some extent. Indeed, customers do not necessarily reject automated services. Some world-renowned online retailers have established their global reputations by delivering very high levels of service through automated sales and service systems. Whatever the particular channel that your organisation uses for delivering its customer service, it is essential that the quality and reliability is as high as possible and that you know what your customers think of the services they receive.
Service Characteristics

Customers who do business with you have high expectations. They expect as a minimum that you will deliver the Core Product or Core Service to the appropriate specifications and quality. The correct items should be delivered, as ordered, to the right destination and at the right time. In the case of a core service, that must also be provided as agreed - often within a Service Level Agreement or contract.

But what exactly do your own customers expect? It is important for you and your team to analyse the detailed service characteristics that you deliver to customers. Think carefully about the range of service characteristics that your team provides.

**DEFINITION**

**Service Characteristics**

Service characteristics are the individual elements that make up the service provided to customers.

**Service Characteristics** can be grouped under the following seven headings, with examples given below.

**Reliability**

For example:

- The quality attached to a product
- Prompt delivery of an item
- Correct numbers of products requested in a delivery

**Competence**

For example:

- Efficient packaging of a number of items in a delivery
- Efficient delivery and unloading of items at the customer's premises
- Being an accurate advisor to customers

**Responsiveness**

For example:

- Service recovery processes in the case of problems, with adequate compensation, if appropriate
- Responding to internal customers' needs on time
- Helping internal customers resolve problems and difficulties
Communication

For example:
- Pre-purchase product information
- After-sales services and information
- Providing accurate and timely information for internal customers

Understanding Customers

For example:
- Taking the trouble to check on customers’ requirements
- Getting to know the customer’s processes
- Understanding the customer’s business and anticipating their future needs

Accessibility

For example:
- Being available when needed
- Being flexible
- Having service available at as many times and locations as possible
- Making use of technology to provide a more flexible service

Personal Qualities

For example:
- Trustworthy
- Being proficient and professional
- Honesty
- Approachability
- Being pleasant and courteous to customers
- Being a good listener when needed, and showing empathy
WORK-BASED ACTIVITY

Service Characteristics Delivered by Your Team

Think about the seven service characteristics that make up the overall service that your own team delivers to its customers. (The customers could be external, internal or corporate). Identify two examples of each service characteristic for the customer service that your own team is responsible for.

<table>
<thead>
<tr>
<th>Service Characteristic</th>
<th>Example 1</th>
<th>Example 2</th>
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<tbody>
<tr>
<td>Reliability</td>
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<td>Competence</td>
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<td>Understanding Customers</td>
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<td>Accessibility</td>
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<td>Personal Qualities</td>
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The Service Offer

Many organisations succeed in winning and retaining customers by building an effective Service Offer. By choosing the right combination of service characteristics they can meet and exceed their customers’ expectations. The Service Offer can have the important benefit of marking out one service provider from another in the eyes of the customer.

DEFINITION

Service Offer

A Service Offer defines the extent and limits of the customer service that an organisation is offering. In commercial organisations the Service Offer is often partly determined by the price that is being charged and by the Service Offer of competitors. Some organisations try to build a unique Service Offer - one that differentiates the organisation from its competitors or comparable organisations.
To give an example, a distinctive and successful Service Offer was provided by a solicitor. The company wanted to differentiate itself from other solicitors by offering a Home Advice Service. It recognised that some customers preferred the convenience of discussing their legal requirements in their own home, rather than always travelling to the centre of the town where the company was based. Home visits proved a successful Service Offer and many new clients were attracted to do business with the company. The extra business generated made up for the increased cost of travelling to clients’ homes, customers valued the accessibility of the service and found the solicitor more approachable.

Non-competitive organisations also benefit from designing and building the right Service Offer for their customers. For instance, the Service Offer of a health authority is vitally important for its patients. Service characteristics such as accessibility, reliability and understanding customers can be just as critical in the eyes of patients as the actual health treatment itself. It is common for health authorities to Benchmark their Service Offer against other health authorities, trying to build a Service Offer which is as good, if not better than other, similar health authorities.

WORK-BASED ACTIVITY

Adding to Your Service Offer

Analyse the Service Offer of your own team or organisation. Use the information from the previous activity in which you gave examples of the service characteristics that your team or organisation is responsible for. Now try to think of what you could add to your Service Offer, in order to improve the service for customers, and also to build a Service Offer which is distinctive in your own sector or marketplace.

Additions to Our Service Offer:

Changing the Service Offer

Organisations have processes for changing their Service Offer, and you as the Manager or Team Leader must keep to these processes if you intend to make changes to your own Service Offer. Within a typical process, it is important to find out from customers themselves what they want and expect from your organisation. Just as important when designing or changing the Service Offer is to ensure that any increased costs of delivering services in a new way are justified, and
that employees have the knowledge, skills and support to deliver the services effectively and consistently.

1.4 Customers Are Key

Customers’ Expectations are increasing. Your organisation probably has competitors who are trying to improve their own Service Standards in order to exceed their customers’ expectations. Your organisation (and therefore your team) needs to do the same, but better. Because today’s customers are so demanding, it is only those organisations which recognise rising customer expectations, and continuously go the extra step to satisfy and delight their customers, that will succeed. Customers, then, are key for you and your team.

Figure 1, Increasing Customer Expectations, shows three different levels of service that can be provided for customers. The three levels of service that an organisation can provide are described below.
**Core Service** - this will provide the basic products and services, and will meet some customers’ expectations. It is unlikely to satisfy other customers who have experienced better service elsewhere. This could be through the purchase of an entirely different product or service. Today’s customers remember the best service they have received (or heard about), and demand that level of service from all their transactions, regardless of the product or sector. If you continue to offer just core service, it is likely that customers will move to competitors before too long.

**Augmented Service** - this goes beyond core service and is the minimum your organisation should provide in order to at least keep up with the market. You will generally be meeting and exceeding customers’ expectations. Augmented Service will retain many customers in the short and medium term, but this level of service does not consistently deliver really exceptional experiences for customers - the “Wow!” factor is not there all the time.

**Excellent Service** - this means that your organisation is maximising its chances of being the market leader, constantly innovating to find new ways of exceeding customer expectations, with highly skilled and motivated individuals delivering exceptional service to customers. You are consistently attempting to exceed customers’ expectations - every time a customer interaction takes place. This level of service really does consistently deliver the “Wow!” factor.
Sandra Gonzales, GCU’s Director of Customer Service, has carried out an assessment of customer service at one of its European Banks. This was done by holding several focus groups, to which some of the bank’s customers were invited. The customers were asked to compare GCU’s services to what they knew of other banks. Here are some typical customer comments:

- “My account is generally managed well, and I am really pleased with the way they deal with my queries over the telephone.”
- “When I switched to GCU from my previous bank I was pleasantly surprised at the level of customer service.”
- “They may not be the best bank, but I’ve found them better than I expected them to be.”
- “I have heard of another bank whose service for customers is really amazing, but nevertheless I am very happy I opened an account with GCU.”

Select the best answer to the question:

Which level of service is GCU Finance providing for its customers?

A  Core Service
B  Augmented Service
C  Excellent Service
Components of Excellent Service - in the Eyes of the Customer

To help you create a Customer Focused Culture in your team, use the Components Of Excellent Customer Service, which show what your customers want to experience when they do business with you.

**DEFINITION**

**Customer Focused Culture**

A Customer Focused Culture exists in a team when customers (both external and internal) are given the highest priority in the objectives, targets, activities, and decisions of the team. The customer is placed at the heart of everything that the team does.

The Components of Excellent Customer Service shown in Figure 2 - are described below.

**Deliver The Promise**

Keep to what you and your organisation say you will do. Understand the way your customers want to be treated and adapt your behaviour as far as possible. Whatever you do, don’t let your service delivery fall short of your customers’ expectations.

**Go The Extra Mile**

Try, if you can, to over-deliver. Delight your customers by giving them what they expect, plus some more. If you can, provide something extra for every customer. This will help establish
loyal customers, who will recommend you to colleagues, friends and family, and build a great reputation for your organisation.

As an example, one quality which customers may want from your team is the ability to interact emotionally. In other words, your team members should not simply carry out their work in a mechanical way when dealing with customers. Your team members need to be skilled and knowledgeable in order to:

- Recognise their own emotions and their customers’ emotional reactions
- Control their own emotions
- Use their own emotions to make good decisions
- Act effectively

**Make It Personal**

Customers want to be treated as individuals. They love it when you say or do something that shows you are interested in them. It does not have to be anything big or difficult that you do - but whatever way you choose, make sure it is genuine. Customers in many situations will expect a **Service Personality**.

**DEFINITION**

**Service Personality**

An excellent service provider tends to have its own Service Personality - an identifiable set of service characteristics that defines how its service provision is different from that of its competitors.

This might include “service with a smile” for face-to-face transactions, or simply a friendly and responsive personality at the end of the telephone line. Motivate your team members to add their own enthusiasm and passion. Be careful though; this must be done in the right way - those personal touches must not seem false or over-done.

An example is an insurance company which gives distinctive, personal attention to customers on the telephone. It is always a human, not an automated response system that answers the calls. If a customer needs to transfer to another department, the same person “holds the hand” of the customer and continues to deal with the new transaction. The company achieves this by empowering its staff - and training them to deal with a wide range of different transactions.
**Keep It Simple**

Make the customer transaction as simple as possible - for the customer. In general, they just want to do business with you and then get on with the rest of their day. Yes, they want to be treated specially, but they also want the transaction to be simple and straightforward. To keep it simple your team will need clear procedures and great internal communication. Processes should be more customer focused than organisation focused.

**Resolve Problems Well**

If a customer has a problem, take it seriously and resolve it well. If you resolve a problem for customers in a quick and responsive way, they will be your most loyal ambassadors in the future. Make the solution simple and deal with it efficiently. Customers want problems to be resolved quickly, but above all they need to be kept informed. They want to know what you are doing about the problem, and what will happen next. Learn from mistakes, so that your team uses a problem or complaint as a way of improving the way you do things. Create a no-blame culture in your team - accepting that problems do happen and they should be shared and owned up to.

**KNOWLEDGE-CHECK 1.2**

**Euro-Deporte - Resolving Problems Well**

Jane Laporte, Customer Service Team Leader at the Euro-Deporte Fitness Centre, received several customer complaints recently. She is meeting with her team to advise on how to deal with them. One of the team asked: “When we are really busy during the day, what is our priority - to handle a customer’s problem immediately, or to deal with the members coming through the door who are either booking in for a session or want some other form of help?”

Select the best answer to the question:

Which advice should Jane give?

A **O** Handle the customer complaint later, after the members’ demands have been dealt with

B **O** Acknowledge the customer complaint, tell the customer when it can be dealt with, so that the members coming through the door are not delayed

C **O** Deal with the customer complaint as the first priority and deal with the members coming through the door when the customer’s problem has been resolved

**1.5 The Organisational Competencies Required for Excellent Customer Service**

Now let’s translate what customers want from you into some organisational competencies - so that you can see what you as Manager or Team Leader must achieve within your team. If customers want excellent service, how does the organisation or team go about providing it?
Figure 3, Developing and Sustaining a Reputation for Service Excellence, identifies the **Organisational Competencies** that need to be in place to deliver that excellent service. These organisational competencies have to be in place right across the organisation. Although you can do a lot yourself with your own team, **World Class Service Excellence** relies on a commitment and drive from the very top of the organisation to build these competencies. The competencies are described below.

![Diagram of Organisational Competencies](image)

**Service Personality**

The organisation has a well-defined personality which defines the particular way it delivers service and interacts with its customers.

**Service Culture**

There is a culture throughout the organisation’s people that focuses on giving excellent service to both internal and external customers. Leaders and managers are committed to the service culture. They communicate the organisation’s vision, values, leadership and continuous improvement methods to employees. Employees understand their own role in supporting the service culture.

An example is provided by a large, multinational organisation that supplies food products to retail stores. It includes customer service in its mission statement, publishes its organisational values prominently on its website, and issues a one-page “Customer Service Credo” to all its employees. It ensures that all its people have a clear understanding of the importance of customer service in all that they do.
Committed Staff

Employees are well-motivated, have a can-do attitude, enjoy team working and supporting their internal customers. Professional relationships exist throughout the organisation, with high levels of trust, openness and a no-blame culture, encouraging continuous improvement.

An example is shown by an organisation where teams regularly have their own meetings to review customer service issues, talk through improvements to processes and deal with customers’ problems. Each month they appoint an “Employee of the Month” - and the winners of the award are sometimes people who deal only with internal customers.

Customer Focused Processes

Systems and processes are designed around customers, whether internal or external. Six systems or processes in particular are seen as fundamental: communication systems, systems for listening to customers and employees, training systems, appraisal, reward and recognition systems, performance measurement systems and service recovery systems.

For example, at all sites of a European retailer there are notice boards to display up-to-date graphs showing customer satisfaction levels. This ties employees’ and teams’ performances firmly to improvements for customers.

Easy To Do Business With

If the first four organisational competencies are in place, then they should lead to really positive results for customers - they will find the organisation easy to do business with.

An example is provided by guests at a prominent hotel group. The hotel finds that it wins and keeps many new customers because it has ensured its online room booking service is highly customer focused and easy to use. Combined with the excellent service reported by customers when they stay at the hotel, this means the organisation is easy to do business with.

Financial Benefits

Once the organisational competencies are in place, your team and organisation can build a reputation amongst its customers for service excellence. This in turn leads to Customer Loyalty, recommendation and - in general - to financial success.
## WORK-BASED ACTIVITY

### Self Assessment - Team Leader or Manager Performance

This self assessment enables you to check your own actions. Are you doing the right things as a Manager or Team Leader? For each of the ten performance statements below, think about your own performance as a Manager or Team Leader.

Select to show whether you meet the performance statement Consistently, Partly or Not at all.

<table>
<thead>
<tr>
<th>SERVICE CHARACTERISTIC</th>
<th>Consistently</th>
<th>Partly</th>
<th>Not at all</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. I know my organisation’s mission and/or vision</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>2. My team has a customer focus</td>
<td>☐</td>
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</tr>
<tr>
<td>3. I set individual objectives for my team members</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>4. I give team members individual discussion time</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>5. I manage my own time and responsibilities well</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>6. I assess my team’s training and development needs</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>7. My team communicates well</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>8. I know how to deal with problems in my team</td>
<td>☐</td>
<td>☐</td>
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</tr>
</tbody>
</table>

Identify Your Key Issues from this Self Assessment:

...
### WORK-BASED ACTIVITY

#### Team Action Plan

Now you need to plan your areas for change.

- Write below the actions that you intend to take over the coming weeks and months
- Share the plans with your team to make sure they are all on board with the changes and improvements that you will lead; explain also the reasons for these changes and their part in making them happen
- Keep a check on your actions by reviewing them regularly at your team meetings
- Record the progress that you and your team make with your Team Action Plan

<table>
<thead>
<tr>
<th>ACTION</th>
<th>PROGRESS MADE/COMPLETED</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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<td>2</td>
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<td>4</td>
<td></td>
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<tr>
<td>5</td>
<td></td>
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</tbody>
</table>

#### 1.6 Reputation is Your Key to Success

It is an established fact that a loyal customer base explains the differences between companies’ financial performances more than any other single factor. Customer loyalty depends in turn on the organisation’s reputation. Hence the reputation that becomes attached to an organisation’s name or brand is critical to its continued success. Think of some of the world’s best known brands - Disney, John Lewis, Singapore Airlines, First Direct and Amazon, for example. They have forged fantastic reputations that are the envy of all other players in the industry.

Reputation can be established and maintained, in the eyes of customers, in a number of ways.

- Reliable products
- Excellent customer service
- Ethical policies
- Innovative products or services
- Speed of growth of the organisation
- Public relations
Ultimately, however, one of the main drivers of reputation is service excellence, and this is a driver that you can manage. Service excellence is not just about delivering your product or service effectively. Certainly your customers will expect this to happen, but they expect a lot more from you. They don’t just want to be “satisfied”, they demand that you do a lot more - and if you don’t they will go elsewhere.

Be aware that reputation works in a similar way with internal customers. A function or department within an organisation might be viewed by others in the organisation in a favourable or poor light, depending on the level of internal customer service it provides. Poor internal service reflects negatively on an organisation’s external service.

**Added Value**

In order to increase your organisation’s reputation for excellent customer service, consider the **Added Value** that you can provide, along with the core products and services. Your Added Value can be the extra service - perhaps service innovation or an improved emotional content in the Service Offer that you provide for your customers. Many customers will view the following as adding value to your Service Offer:

- Enhanced emotional content of service delivery especially those personal touches which make the customer feel that they are being treated as special
- New types of service which other organisations are not offering
- Individual treatment, perhaps making extra efforts to discover what customers want
- Highly responsive ways of solving your customers’ problems

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**BEST PRACTICE**

**Euro-Deporte – Building the Reputation**

Stephan Johansson, Senior Vice President, Product and Service, Euro-Deporte:

“We developed our high-quality customer service approach largely because we believed that there would be a demand for it from our customers - both existing and new ones. Some of our people were sceptical at first. We were the first to introduce the ‘fitness alert service’ which sends out a free text message informing members of our fitness centres about new initiatives and new products, and changes to fitness class schedules, for example.”

“Some people said that members would resent receiving texts from us, but after we had launched the system we asked our customers what they thought of it. When we studied the feedback, our customers really appreciated it. So we continued to provide that facility. It’s one of those things that is only small, but it enhances our reputation, and, together with our high-intensity customer service training that we introduced for all customer-facing staff, it’s having a great positive impact on our bottom line.”
1.7 Why Managers Are So Important

Managers and Team Leaders can make or break an organisation’s values. A leader who successfully creates a customer focused culture has a big impact on business success - through staff retention and customer loyalty.

As a Manager or Team Leader you should communicate your organisation’s Customer Service Strategy to your team - to inspire them to exceed their customers’ expectations. You can only achieve this if you believe in your own abilities as a leader - acting as a role model and sharing your positive emotions with your team.

![Believe in your own abilities as a leader](image)

**BEST PRACTICE**

**Unicentro - Communicating the Strategy**

James Wright-Smith, senior Manager Planning and Research at Unicentro:

At Unicentro the Chief Executive encourages his staff to “Let your confidence and personality shine through. Be yourself.” But he knows this is only possible thanks to the systems and training that we have in place, much of which is used to communicate the company’s objectives for customer service. This gives his staff both the competence and confidence to make the difference.

“The difference is how people feel when they finish talking to us. They go away with a feeling that they have had a good conversation with a friend. It’s the attitude our people have and their sense of humour. But to do this they need to feel both competent and confident and be good communicators, willing and able to make decisions.”
1.8 Fundamental Concepts of Customer Service Teams

In order to become an effective Manager or Team Leader, you need the support of your team. Excellent organisations have teams that are truly obsessed with customers. A team is the ideal place to make the customer focused culture a reality, with like-minded colleagues developing a passion for genuinely excellent customer service.

Your team is the best place to start making the improvements that are needed for world class service excellence. Of course, it is not simply a matter of becoming an enthusiast for customer service. Even if everyone recognises how important excellent service is as an objective, the right people, resources and processes must also be in place for it to happen. Think about the level of customer focus in your own team, how you could increase it, and the developmental activities that your team could introduce in order to make big strides towards meeting and exceeding expectations - of both internal and external customers.

Benefits of Team Working

Now think about why effective teams are particularly beneficial for customer service. Let’s identify some of the benefits of effective team working.

- **Motivation** - Some people are better team players than others, but we all benefit from being involved with other people, and a sense of involvement often leads to a sense of motivation.

- **Shared Vision** - Teams of customer service professionals need to be clear about the team’s overall objectives. This leads to a shared vision of customer service - all the team pulls together, recognising that the prime objective is to deliver excellent service to customers.

- **Problem Resolution** - Sometimes teams face difficulties. Sharing problems and difficulties with others in a team is another key benefit of team working. Occasionally, for example, individuals can become de-motivated, and do not work fully for the team. At other times, processes can break down, or there can be obstacles to overcome.

- **Team Synergy** - Meeting deadlines for internal and external customers can create pressures in a team. Enlisting the help of others can help get through those difficulties. This team synergy is an essential part of excellent internal customer service.
Here is a summary of the benefits of effective team working.

**GUIDE-LINE**

**Benefits of Effective Team Working**

- The team has shared objectives
- Better knowledge of others’ job roles
- Enjoyment of working with others
- Improved communication skills in the team will benefit customers
- Increased involvement, job satisfaction and motivation
- Team spirit
- Improved working relations
- Someone to help out when there are deadlines to meet or problems to solve
- Better communication between departments or units of the organisation

**What Makes an Effective Team?**

We now need to clarify another key reason why good team working - team synergy - is so vital for customer service. Customers do business with your organisation in order to access your products and services. Few of those products and services can be dealt with by one person alone - several team members are usually involved with an individual customer transaction. If seamless service is to be provided, then your team must work closely together. Each member should know both their own role and the roles of other team members.

**Every Second Counts!**

Think of a Formula 1 motor racing team - the essence of team synergy. The weeks and days building up to a Formula 1 race are spent perfecting the car, the tactics and all the critical team activities that will take place on race day. The engineers prepare the car for the race, setting it up with incredible precision to suit the driver. During practice sessions and the race itself all the team members have their own specific roles to play.

When the driver comes in for a pit stop every detail - and every second - counts! All the team members must perform their own, well-rehearsed tasks rapidly and accurately. Everything must be completed with perfect timing, to work in harmony with the rest of the team. How does the motor racing team do this so effectively? They achieve it through training, understanding what the customer (the driver in this case) wants - and through practice, to build their skills to the very highest levels.

Apply the principles of the motor racing team to your own team’s role with customers. Work with your team members to understand exactly how to deliver excellent service. Encourage
team members to rehearse and improve their joint processes - so that in dealing with each and every customer, the team performs to perfection.

KNOWLEDGE-CHECK 1.3

Unicentro - Team Working

Yan Jung Wan, Customer Service Manager for a new Unicentro retail centre in Malaysia, is running a training session for his newly recruited team of Retail Security Advisors. They will be patrolling the centre - which covers a large area - helping customers and retail workers, and dealing with all security issues. They will need to be multi-skilled in order to meet the expectations of their customers - who are individual shoppers, retail workers, shop owners and tourists.

Yan Jung Wan wants the team to develop a multi-skilled approach to their work, believing that this will help deliver excellent service to the various types of customers. During the training session an issue has arisen - several of the team want to know why they should have to handle these different demands from the range of different customers, as previously they all carried out a straightforward security guarding role.

Select the best answer to the question:

Which is Yan’s best answer to the team?

A ☐ Multi-skilling delivers seamless service to customers, enhancing Unicentro’s reputation
B ☐ Unicentro cannot afford to employ security guards as well as customer advisors
C ☐ Unicentro’s policy requires the multi-skilled approach - and it’s in the job descriptions
1.9 Knowing and Following Your Organisation’s Rules

It is critical that your organisation’s processes, rules and regulations are followed. Here are some guidelines on following processes.

GUIDE-LINE

Following Organisational Processes

Organisational Procedures Relating to Your Manager or Team Leader Role

Customer service, as with any business activity, must be conducted according to your organisation’s rules, guidelines and expectations. It should also be delivered in such a way as to fit with the broader objectives that your organisation has for customer service, such as in a statement of organisational values, strategic objectives or a Credo. Find out how others deliver excellent service and adopt their best practices wherever you can.

Laws

There are key laws which you must ensure that your team keeps to. The laws that are relevant to you depend partly on the sector you are working within, but there are some key areas of legislation which apply to all or most organisations. Check the laws applying to:

- Consumer Rights and Consumer Protection relating to selling goods and services
- Data Protection and Freedom of Information
- Sex Discrimination
- Equality and Diversity
- Disability Discrimination
- Health and Safety
- Human Rights
- Copyright
- Any other aspects specific to your sector or industry

The Internet is a good source of information and advice on these and other laws. Be sure to confirm the reliability of the specific websites that you use by cross-checking with others and by examining in detail the sources of the information given and the originators of the website. In addition, check any information you obtain against your own organisation’s publications and processes, making absolutely certain that you as the Manager or Team Leader are using and giving the correct advice to your team.
Following Organisational Processes (continuation)

Even laws are open to interpretation. One particular term that you will come across in relation to several laws is the word “reasonable.” For example, in the UK’s Disability Discrimination Act (1995), employers have a duty to make reasonable adjustments where physical features of their premises or arrangements place a disabled person at a substantial disadvantage compared to a non-disabled person. In relation to Health and Safety, organisations have a duty to take reasonable care of the workforce by providing (where relevant) safe plant and machinery, employing competent staff and providing safe systems of work.

The word reasonable allows those who enforce or uphold the law to use discretion according to the circumstances; you should view reasonable as what a well-informed person or organisation would be expected to do according to today’s standards of behaviour. Ensure that you talk to others and reach a consensus in your organisation about how these laws require you to organise services and facilities for both external and internal customers.

**Rules and Regulations**

Ensure that you and your team keep within the rules when delivering service to customers, and more broadly in the operation and management of customer relationships. In addition to the legal considerations, you should ensure that you know all about service level agreements and contract terms that will affect how you must work with your customers. There are often important rules which affect, for example, how to capture, record, manipulate and pass on customer data, and these will usually cover both commercial confidentiality and the protection of personal data.

**Know and Communicate the Rules**

An essential point to remember is that it is your own responsibility as a Manager or Team Leader working with customers, to ensure you have a thorough knowledge of relevant legislation and rules. For example, if you travel to your customer’s premises for a planning meeting or focus group discussion, make yourself aware of, and abide by that organisation’s rules - such as for health and safety or commercial confidentiality. Spread the message throughout your team, and reinforce it regularly at meetings and team activities.
### 1.10 End-of-Module Knowledge-Check

#### KNOWLEDGE-CHECK 1.4

Select the best answer to the question:

1. **Customer Service is often defined as:**
   - A. Everything an organisation does to meet the needs of its stakeholders
   - B. Everything an organisation does to meet customers’ expectations and produce customer satisfaction
   - C. What an organisation supplies in addition to its normal range of products

2. **Prompt delivery of an item to a customer is an example of a Service Characteristic known as:**
   - A. Reliability
   - B. Accessibility
   - C. Professionalism

3. **Core Service is a level of service which:**
   - A. Provides a high standard of service delivery
   - B. Is likely to satisfy most customers
   - C. Provides only the basic products and services

4. **Team Synergy is:**
   - A. A team gaining by working well together
   - B. A team’s approach to customers
   - C. A team’s policy on internal Customer Service

5. **Customer Service should be conducted according to:**
   - A. Individual preferences
   - B. The individual employee’s approach to handling customer transactions
   - C. Your organisation’s rules, guidelines and expectations
# Answers to Module Knowledge-Checks

<table>
<thead>
<tr>
<th>Module 1</th>
<th>Module 2</th>
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</thead>
<tbody>
<tr>
<td>Knowledge-Check 1.1: B</td>
<td>Knowledge-Check 2.1: B</td>
</tr>
<tr>
<td>Knowledge-Check 1.2: B</td>
<td>Knowledge-Check 2.2: A</td>
</tr>
<tr>
<td>Knowledge-Check 1.3: A</td>
<td>Knowledge-Check 2.3: C</td>
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<td>Knowledge-Check 1.4: B,A,C,A,C</td>
<td>Knowledge-Check 2.4: C,B,A,C,B</td>
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<thead>
<tr>
<th>Module 3</th>
<th>Module 4</th>
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<td>Knowledge-Check 3.1: B</td>
<td>Knowledge-Check 4.1: C</td>
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<td>Knowledge-Check 3.2: C</td>
<td>Knowledge-Check 4.2: C,C,C,C,A</td>
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<td>Knowledge-Check 3.3: C,A,C,C,A</td>
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<th>Module 5</th>
<th>Module 6</th>
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<tr>
<td>Knowledge-Check 5.1: B</td>
<td>Knowledge-Check 6.1: A</td>
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<td>Knowledge-Check 5.4: B,C,C,C,A</td>
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<thead>
<tr>
<th>Module 7</th>
<th>Module 8</th>
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<tbody>
<tr>
<td>Knowledge-Check 7.1: A</td>
<td>Knowledge-Check 8.1: B</td>
</tr>
<tr>
<td>Knowledge-Check 7.2: C</td>
<td>Knowledge-Check 8.2: C,A,C,A,A</td>
</tr>
<tr>
<td>Knowledge-Check 7.3: C,A,A,C</td>
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</table>

| Module 9 | |
|----------| |
| Knowledge-Check 9.1: A | Knowledge-Check 9.2: A |
| Knowledge-Check 9.3: A,A,B,A,C | |
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Institute of Customer Service  
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Customer Service Awards  
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MyCustomer.com  
www.ukcsi.com  
UK Customer Satisfaction Index
## Mapping to National Occupational Standards for Customer Service

### UNIT 7  (THEME: CUSTOMER SERVICE FOUNDATIONS)

**Understand customer service to improve service delivery**

<table>
<thead>
<tr>
<th>Knowledge item</th>
<th>Section(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.1 use accepted customer service language and apply its principles</td>
<td>1.4/1.5/3.6</td>
</tr>
<tr>
<td>7.1.1 explain how your organisation builds a Service Offer that will meet customer expectations</td>
<td>1.4/1.5/3.6</td>
</tr>
<tr>
<td>7.1.2 describe how the Service Offer is affected by financial and other resource limitations</td>
<td>1.5/1.6/4.9</td>
</tr>
<tr>
<td>7.1.3 describe what effects the Service Offer may have on the service chain</td>
<td>7.6</td>
</tr>
<tr>
<td>7.1.4 give examples of how customers may form their expectations of the services or products</td>
<td>1.3/1.4</td>
</tr>
<tr>
<td>7.1.5 explain the importance of effective teamwork and service partnerships for the delivery of excellent customer service</td>
<td>1.8/7.6</td>
</tr>
<tr>
<td>7.1.6 give examples of the similarities and differences in planning customer Service Offers for the commercial, public sector and private sector not-for profit organisations</td>
<td>7.6</td>
</tr>
<tr>
<td>7.1.7 explain how customer service can provide added value to a public sector or private sector not-for profit organisation</td>
<td>6.2</td>
</tr>
<tr>
<td>7.1.8 explain how customer service can provide a competitive advantage for a commercial organisation</td>
<td>1.6</td>
</tr>
<tr>
<td>7.1.9 explain why your organisation must limit the level of customer service it gives in order to balance customer satisfaction with organisational goals</td>
<td>2.2</td>
</tr>
<tr>
<td>7.1.10 explain how your behaviour and the behaviour of customers can influence the level of customer satisfaction achieved</td>
<td>1.5/6.4</td>
</tr>
<tr>
<td>7.1.11 give positive examples of how you deal with different customer behaviours and personalities when managing problems and complaints</td>
<td>6.4/6.5/6.6</td>
</tr>
<tr>
<td>7.1.12 explain the importance of effective communication in the delivery of excellent customer service</td>
<td>1.5/2.7/5.3</td>
</tr>
<tr>
<td>7.1.13 give examples of how you ensure that communication with diverse groups of customers is effective and efficient</td>
<td>2.7/5.3/5.6</td>
</tr>
<tr>
<td>7.1.14 explain the significance of continuous improvement within customer service and the way that change and the management of change are central to ongoing customer satisfaction</td>
<td>7.3</td>
</tr>
<tr>
<td>7.2 place customer service principles in context for your professional customer service role</td>
<td></td>
</tr>
<tr>
<td>7.2.1 give examples of approaches different sectors may take to customer service</td>
<td>2.4/3.6</td>
</tr>
<tr>
<td>7.2.2 explain your organisation’s policies and procedures for the delivery of services or products and why it is important to follow them</td>
<td>1.9</td>
</tr>
<tr>
<td>7.2.3 give examples of the Service Offer of competitors of your organisation or explain how your organisation’s Service Offer is benchmarked if it is not in a competitive environment</td>
<td>1.3</td>
</tr>
<tr>
<td>7.2.4 give examples of the essential features and benefits of your organisation’s services or products that influence customer service delivery and satisfaction</td>
<td>1.3</td>
</tr>
<tr>
<td>7.2.5 describe how your organisation balances its needs with customer expectations and needs</td>
<td>2.2/3.5</td>
</tr>
<tr>
<td>7.2.6 explain the ethical and values base of your organisation’s approach to customer service</td>
<td>2.3</td>
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</table>
## UNIT 8  (THEME: CUSTOMER SERVICE FOUNDATIONS)

### Know the rules to follow when developing customer service

<table>
<thead>
<tr>
<th>Knowledge item</th>
<th>Section(s)</th>
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<tbody>
<tr>
<td><strong>8.1 develop customer service following organisational rules and procedures</strong></td>
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<tr>
<td>8.1.1 describe organisational policies and procedures that you would need to take into account to propose improvements or developments to customer service</td>
<td>1.9/8.6</td>
</tr>
<tr>
<td>8.1.2 describe how you would obtain authorisation to change customer service practices</td>
<td>1.9/8.6</td>
</tr>
<tr>
<td>8.1.3 explain the limits of your own authority and who else in the organisation would need to be involved if additional authority is needed for improvements or developments</td>
<td>1.9/8.6</td>
</tr>
<tr>
<td>8.1.4 explain how you would involve colleagues or service partners in the implementation of improvements or changes</td>
<td>1.9/7.6/8.6</td>
</tr>
<tr>
<td><strong>8.2 develop customer service following external regulation and legislation</strong></td>
<td></td>
</tr>
<tr>
<td>8.2.1 explain relevant regulation and legislation relating to consumer protection</td>
<td>1.9</td>
</tr>
<tr>
<td>8.2.2 describe relevant regulation and legislation relating to data protection</td>
<td>1.9</td>
</tr>
<tr>
<td>8.2.3 explain relevant regulation and legislation relating to disability discrimination and equal opportunities</td>
<td>1.9</td>
</tr>
<tr>
<td>8.2.4 explain relevant regulation and legislation relating to diversity and inclusion and discrimination for reasons other than disability</td>
<td>1.9</td>
</tr>
<tr>
<td>8.2.5 explain relevant regulation and legislation relating to health and safety of customers and colleagues</td>
<td>1.9</td>
</tr>
<tr>
<td>8.2.6 explain the need to balance the requirements of regulation with the needs and objectives of your organisation</td>
<td>1.9</td>
</tr>
<tr>
<td>8.2.7 describe how you would incorporate relevant regulation and legislation when planning and implementing improvements and developments</td>
<td>2.2/8.6</td>
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## UNIT 13  (THEME: IMPRESSION AND IMAGE)

### Make customer service personal

<table>
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<tr>
<td>13a how use of your customer’s name makes service more personal</td>
<td>4.5</td>
</tr>
<tr>
<td>13b personality types and their receptiveness to personalised services</td>
<td>4.5/6.5</td>
</tr>
<tr>
<td>13c types of personal information about customers that should and should not be kept on record</td>
<td>1.9/5.6</td>
</tr>
<tr>
<td>13d features of personal service that are most appreciated by customers with individual needs</td>
<td>5.6</td>
</tr>
<tr>
<td>13e body language and approaches to communication that are generally interpreted as open</td>
<td>3.5/4.5</td>
</tr>
<tr>
<td>13f your organisation’s guidelines on actions that are permissible outside of the normal routines and procedures</td>
<td>1.9/8.6</td>
</tr>
<tr>
<td>13g your own preferences and comfort levels relating to how you are willing and able to personalise service</td>
<td>5.6</td>
</tr>
</tbody>
</table>
UNIT 14  (THEME : IMPRESSION AND IMAGE)

Go the extra mile in customer service

<table>
<thead>
<tr>
<th>Knowledge item</th>
<th>Section(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>14a your organisation’s Service Offer</td>
<td>1.3</td>
</tr>
<tr>
<td>14b how customers form expectations of the service they will receive</td>
<td>1.3</td>
</tr>
<tr>
<td>14c what types of service action most customers will see as adding value to the</td>
<td>1.6</td>
</tr>
<tr>
<td>customer service they have already had</td>
<td></td>
</tr>
<tr>
<td>14d your organisation’s rules and procedures that determine your authority to</td>
<td>1.9</td>
</tr>
<tr>
<td>‘go the extra mile’</td>
<td></td>
</tr>
<tr>
<td>14e relevant legislation and regulation that impact on your freedom to ‘go the</td>
<td>1.9/8.6</td>
</tr>
<tr>
<td>extra mile’</td>
<td></td>
</tr>
<tr>
<td>14f how your organisation receives customer service feedback on the types of</td>
<td>3.5/3.6</td>
</tr>
<tr>
<td>customer experience that has impressed them</td>
<td></td>
</tr>
<tr>
<td>14g your organisation’s procedures for making changes in its Service Offer</td>
<td>1.3/1.9</td>
</tr>
</tbody>
</table>

UNIT 23  (THEME : DELIVERY)

Recognise diversity when delivering customer service

<table>
<thead>
<tr>
<th>Knowledge item</th>
<th>Section(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>23a the importance of recognising diversity in relation to age, disability,</td>
<td>5.6</td>
</tr>
<tr>
<td>national origin, religion, sexual orientation, values, ethnic culture,</td>
<td></td>
</tr>
<tr>
<td>education, lifestyle, beliefs, physical appearance, social class and economic</td>
<td></td>
</tr>
<tr>
<td>status</td>
<td></td>
</tr>
<tr>
<td>23b reasons why consideration of diversity and inclusion issues affect customer</td>
<td>5.6</td>
</tr>
<tr>
<td>service</td>
<td></td>
</tr>
<tr>
<td>23c organisational guidelines to make customer service inclusive for diverse</td>
<td>5.6</td>
</tr>
<tr>
<td>groups of customers</td>
<td></td>
</tr>
<tr>
<td>23d legal use and meaning of the word ‘reasonable’</td>
<td>1.9</td>
</tr>
<tr>
<td>23e how to observe and interpret non-verbal clues</td>
<td>3.5/4.5</td>
</tr>
<tr>
<td>23f how to listen actively for clues about your customer’s expectations and</td>
<td>3.5</td>
</tr>
<tr>
<td>needs</td>
<td></td>
</tr>
<tr>
<td>23g techniques for obtaining additional information from customers through</td>
<td>3.5</td>
</tr>
<tr>
<td>tactful and respectful questions</td>
<td></td>
</tr>
<tr>
<td>23h behaviour that might cause offence to specific groups of people to whom</td>
<td>4.5/5.6</td>
</tr>
<tr>
<td>regularly provide customer service</td>
<td></td>
</tr>
<tr>
<td>23i how to impress specific groups of people to whom you regularly provide</td>
<td>5.6</td>
</tr>
<tr>
<td>customer service</td>
<td></td>
</tr>
</tbody>
</table>

UNIT 25  (THEME : DELIVERY)

Organise the delivery of reliable customer service

<table>
<thead>
<tr>
<th>Knowledge item</th>
<th>Section(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>25a organisational procedures for unexpected situations and your role within</td>
<td>1.9/4.10</td>
</tr>
<tr>
<td>them</td>
<td></td>
</tr>
<tr>
<td>25b resource implications in times of staff sickness and holiday periods and</td>
<td>4.10</td>
</tr>
<tr>
<td>your responsibility at these times</td>
<td></td>
</tr>
<tr>
<td>25c the importance of having reliable and fast information for your customers</td>
<td>1.3/1.4/5.3</td>
</tr>
<tr>
<td>and your organisation</td>
<td></td>
</tr>
<tr>
<td>25d organisational procedures and systems for delivering customer service</td>
<td>1.3/4.10</td>
</tr>
<tr>
<td>25e how to identify useful customer feedback and how to decide which feedback</td>
<td>3.5</td>
</tr>
<tr>
<td>should be acted on</td>
<td></td>
</tr>
<tr>
<td>25f how to communicate feedback from customers to others</td>
<td>3.5</td>
</tr>
<tr>
<td>25g organisational procedures and systems for recording, storing, retrieving</td>
<td>3.5/4.10</td>
</tr>
<tr>
<td>and supplying customer service information</td>
<td></td>
</tr>
<tr>
<td>25h legal and regulatory requirements regarding the storage of data</td>
<td>1.9</td>
</tr>
</tbody>
</table>
## UNIT 32  (THEME : HANDLING PROBLEMS)

### Monitor and solve customer service problems

<table>
<thead>
<tr>
<th>Knowledge item</th>
<th>Section(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>32a organisational procedures and systems for dealing with customer service</td>
<td>1.9/6.3/6.5</td>
</tr>
<tr>
<td>32b organisational procedures and systems for identifying repeated customer</td>
<td>6.6</td>
</tr>
<tr>
<td>32c how the successful resolution of customer service problems contributes to</td>
<td>1.4/6.2</td>
</tr>
<tr>
<td>customer loyalty with the external customer and improved working</td>
<td></td>
</tr>
<tr>
<td>32d how to negotiate with and reassure customers while their problems are being</td>
<td>6.4/6.5</td>
</tr>
<tr>
<td>solved</td>
<td></td>
</tr>
</tbody>
</table>

## UNIT 33  (THEME : HANDLING PROBLEMS)

### Apply risk assessment to customer service

<table>
<thead>
<tr>
<th>Knowledge item</th>
<th>Section(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>33a your organisation’s customer service process and the moments of truth</td>
<td>1.9/4.10/6.4</td>
</tr>
<tr>
<td>(those points in the customer service process that have most impact on the</td>
<td></td>
</tr>
<tr>
<td>customer experience)</td>
<td></td>
</tr>
<tr>
<td>33b risk assessment techniques</td>
<td>6.3</td>
</tr>
<tr>
<td>33c how to evaluate risk according to probability of occurrence and</td>
<td></td>
</tr>
<tr>
<td>consequences of occurrence</td>
<td>6.3</td>
</tr>
<tr>
<td>33d the nature of potential customer service risks including financial,</td>
<td>6.3</td>
</tr>
<tr>
<td>reputational and health and safety risks</td>
<td></td>
</tr>
<tr>
<td>33e cost/benefit analysis</td>
<td>6.3</td>
</tr>
<tr>
<td>33f SWOT (Strengths, Weaknesses, Opportunities, Threats) and PE STLE</td>
<td>6.3</td>
</tr>
<tr>
<td>(Political, Economic, Social, Technological, Legal, Environmental) analysis</td>
<td></td>
</tr>
</tbody>
</table>

## UNIT 34  (THEME : HANDLING PROBLEMS)

### Process customer service complaints

<table>
<thead>
<tr>
<th>Knowledge item</th>
<th>Section(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>34a how to monitor the level of complaints and identify those that should</td>
<td>6.6</td>
</tr>
<tr>
<td>provoke a special review of the service offer and service delivery</td>
<td></td>
</tr>
<tr>
<td>34b why dealing with complaints is an inevitable part of delivering customer</td>
<td></td>
</tr>
<tr>
<td>service</td>
<td>6.6</td>
</tr>
<tr>
<td>34c organisational procedures for dealing with complaints</td>
<td>6.6</td>
</tr>
<tr>
<td>34d how to negotiate a solution with your customer that is acceptable to that</td>
<td>6.5/6.6</td>
</tr>
<tr>
<td>customer and to the organisation</td>
<td></td>
</tr>
<tr>
<td>34e the regulatory definition of a complaint in your sector and the regulatory</td>
<td>1.9/6.6</td>
</tr>
<tr>
<td>requirements of how complaints should be handled and reported</td>
<td></td>
</tr>
<tr>
<td>34f when to escalate a complaint by involving more senior members of the</td>
<td>1.9/6.6</td>
</tr>
<tr>
<td>organisation or an independent third party</td>
<td></td>
</tr>
<tr>
<td>34g the implications of admitting liability for an error made by your</td>
<td>1.9/6.6</td>
</tr>
<tr>
<td>organisation</td>
<td></td>
</tr>
<tr>
<td>34h how to spot and interpret signals that your customer may be considering</td>
<td>6.3</td>
</tr>
<tr>
<td>making a complaint</td>
<td></td>
</tr>
<tr>
<td>34i techniques for handling conflict</td>
<td>6.5</td>
</tr>
<tr>
<td>34j the importance of dealing with a complaint promptly</td>
<td>6.3/6.6</td>
</tr>
<tr>
<td>34k why the offer of compensation or replacement service or products may not</td>
<td>6.6</td>
</tr>
<tr>
<td>always be the best options for resolving a complaint</td>
<td></td>
</tr>
<tr>
<td>34l how the successful handling of a complaint presents an opportunity to</td>
<td>1.3/6.2</td>
</tr>
<tr>
<td>impress a customer who has been dissatisfied</td>
<td></td>
</tr>
</tbody>
</table>
### UNIT 39  (THEME : DEVELOPMENT AND IMPROVEMENT)

**Work with others to improve customer service**

<table>
<thead>
<tr>
<th>Knowledge item</th>
<th>Section(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>39a who else is involved either directly or indirectly in the delivery of customer service</td>
<td>8.2</td>
</tr>
<tr>
<td>39b the roles and responsibilities of others in your organisation</td>
<td>4.7</td>
</tr>
<tr>
<td>39c the roles of others outside your organisation who have an impact on your services or products</td>
<td>7.6</td>
</tr>
<tr>
<td>39d what the goals or targets of your organisation are in relation to customer service and how these are set</td>
<td>2.2/2.3/2.4</td>
</tr>
<tr>
<td>39e how your organisation identifies improvements in customer service</td>
<td>8.2/8.6</td>
</tr>
</tbody>
</table>

### UNIT 40  (THEME : DEVELOPMENT AND IMPROVEMENT)

**Promote continuous improvement in customer service**

<table>
<thead>
<tr>
<th>Knowledge item</th>
<th>Section(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>40a how service improvements in your area affect the balance between overall customer satisfaction, the costs of providing service and regulatory requirements</td>
<td>8.3</td>
</tr>
<tr>
<td>40b how customer experience is influenced by the way service is delivered</td>
<td>1.2/1.3/1.4</td>
</tr>
<tr>
<td>40c how to collect, analyse and present customer feedback</td>
<td>3.5</td>
</tr>
<tr>
<td>40d how to make a business case to others to bring about change in the products or services you offer</td>
<td>8.6</td>
</tr>
</tbody>
</table>

### UNIT 41  (THEME : DEVELOPMENT AND IMPROVEMENT)

**Develop your own and others’ customer service skills**

<table>
<thead>
<tr>
<th>Knowledge item</th>
<th>Section(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>41a organisational systems and procedures for developing your own and others’ personal performance in customer service</td>
<td>4.2 4.3</td>
</tr>
<tr>
<td>41b how your behaviour impacts on others</td>
<td>4.5/4.6/5.4</td>
</tr>
<tr>
<td>41c how to review effectively your personal strengths and development needs</td>
<td>4.6/9.2/9.5</td>
</tr>
<tr>
<td>41d how to put together a personal development plan for yourself or a colleague that will build on strengths and overcome weaknesses in areas that are important to customer service</td>
<td>9.5</td>
</tr>
<tr>
<td>41e how to obtain useful and constructive personal feedback from others</td>
<td>9.2/9.5</td>
</tr>
<tr>
<td>41f how to respond positively to personal feedback</td>
<td>4.6/9.5</td>
</tr>
<tr>
<td>41g how to put together a coaching plan that will build on the strengths of the learner and overcome their weaknesses in areas that are important to customer service and their job role</td>
<td>4.4/4.6</td>
</tr>
<tr>
<td>41h how to give useful and constructive personal feedback to others</td>
<td>9.2/9.5</td>
</tr>
<tr>
<td>41i how to help others to respond positively to personal feedback</td>
<td>9.2/9.5</td>
</tr>
</tbody>
</table>
## Lead a team to improve customer service

<table>
<thead>
<tr>
<th>Knowledge item</th>
<th>Section(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>42a  the roles and responsibilities of your team members and where they fit in with the overall structure of the organisation</td>
<td>4.7</td>
</tr>
<tr>
<td>42b  how team and individual performance can affect the achievement of organisational objectives</td>
<td>1.8/2.4/5.2</td>
</tr>
<tr>
<td>42c  the implications of failure to improve customer service for your team members and your organisation</td>
<td>1.5/1.6/7.3</td>
</tr>
<tr>
<td>42d  how to plan work activities</td>
<td>9.4</td>
</tr>
<tr>
<td>42e  how to present plans to others to gain understanding and commitment</td>
<td>5.3</td>
</tr>
<tr>
<td>42f  how to facilitate meetings to encourage frank and open discussion</td>
<td>5.3</td>
</tr>
<tr>
<td>42g  how to involve and motivate staff to encourage teamwork</td>
<td>5.4/5.5/5.8</td>
</tr>
<tr>
<td>42h  how to recognise and deal sensitively with issues of underperformance</td>
<td>5.3/5.4/5.8</td>
</tr>
</tbody>
</table>
Glossary

**Accessibility**
A service characteristic which includes, for example, being flexible and having service available at as many times and locations as possible.

**Action-Centred Leadership**
A simple checklist approach to planning tasks. It helps a Manager to identify the key aspects of any task which a team may be taking on or planning. Using a checklist approach (Task-Team-Individual), the Manager the three aspects: how the task will be undertaken, how the team will develop through completing it, and how the task can benefit the development of individual team members. In applying Action-Centred Leadership to a customer service team in particular, the manager should also consider the implications for customers.

**Active Listening**
Making a conscious, planned effort to apply specific listening skills. It is a skill that can be developed and involves asking well planned questions to ensure that one really understands customers' and team members' needs and expectations. Feedback can also be given, perhaps through gestures and body language, to reinforce the fact that the listener is understanding what is being communicated.

**Added Value**
Added Value is the extra, over and above the basic product or Service Offer that an organisation makes available to its customers. This added value represents extra benefits that can truly delight customers and keep them loyal.

**Aggressive Behaviour**
A type of behaviour in which one disregards the feelings and views of others.

**Appraisal Review System**
A structured approach to reviewing and planning of an individual team member’s work and development, usually through regular, one-to-one meetings between the individual and his or her Manager.

**Assertive Behaviour**
A type of behaviour in which one acts in an adult manner, applying thinking and reasoning. If one acts assertively one puts one's own point across in a clear, firm, but fair manner.

**Assurance**
A service quality factor - the knowledge and courtesy of the employees and their ability to convey trust and confidence.

**Augmented Service**
A level of service which goes beyond core service and is the minimum your organisation should provide in order to at least keep up with the market. You will generally be meeting and exceeding customers’ expectations. Augmented Service will retain many customers in the short and medium term, but this level of service does not consistently deliver really exceptional experiences for customers - the “Wow!” factor is not there all the time.

**B2B**
A Business-to-Business organisation; the customer is another business rather than an individual.

**Barrier To Change**
Any obstacle which may prevent the implementation of a planned change.

**Belief Cycle**
A vicious circle (of Belief, Attitude, Behaviour and Outcome), which can be broken by consciously changing one’s attitude and therefore modifying one’s tendency to behave in a particular way. This concept is useful for an individual dealing with a difficult situation or person.

**Benchmark**
In customer service a benchmark is the service level or quality attained by another organisation, which may be used to compare performance and to set targets. For example a team could benchmark its own customer service ratings against the levels achieved by the best organisation in the sector.
**Blended Learning**
A mixture of different learning types, often applied to the combination of e-learning or distance learning with some face-to-face interaction with tutors/trainers and/or other learners.

**Body Language**
We communicate using words but they don’t usually tell the whole story. Body language is a collection of expressions on our face and gestures we make. Very often body language tells us more about what somebody is actually thinking than the words they use. When you are dealing with a customer you can learn a lot about what they thinking from their body language. This also means that you need to be aware of the messages you are giving to the customer through your own expressions and gestures - your own body language.

**Business Case**
A clear justification, usually including financial details, of why a specific proposal, investment or change is worthwhile from an organisational viewpoint.

**Circle of Frustration**
A vicious circle, often applied to delegation, in which a Manager can tend to delegate repetitive, undemanding tasks to individuals, who find the delegated tasks boring, and therefore fail to improve their own skills and motivation. The Manager then sees the individual as someone who is low-skilled and poorly motivated.

**Coaching**
Working with another individual to help them develop their skills and knowledge. It is normally carried out one-to-one, with the coach identifying and signposting the support and resources that the individual needs in order to develop.

**Code of Practice**
Many trade associations and professional bodies have a Code of Practice that guides members on how they should conduct their business. Most Codes of Practice include guidance on how to deal with customers. In particular they usually cover how members should deal with complaints and customer problems. Codes of Practice do not have the same kind of authority as regulation and legislation. However, if a member always ignores a Code of Practice, the association or professional body may make it very difficult for that member to continue in business.

**Committed Staff**
An organisational competence which contributes to excellent customer service. It is characterised by employees who are well-motivated, have a can-do attitude, enjoy team working and supporting both internal and external customers.

**Communication**
A service characteristic important for service excellence which includes, for example, providing customers with good quality pre-purchase product information, information about after-sales service and accurate and timely information for internal customers.

**Competence**
A service characteristic important for service excellence which includes, for example, the efficient packaging of a number of items in a delivery and being an accurate advisor to customers.

**Complaint Analysis**
Gathering information about customer complaints in order to spot trends and identify where processes may be breaking down and therefore where improvements need to be made.

**Components of Excellent Customer Service**
The critical organisation competencies which are features of organisations which have actually achieved a reputation for excellent customer service.

**Continuous Improvement**
Many organisations try to keep ahead of competitors by providing better customer service. If competitors also do this, organisations have to keep improving their customer service to stay ahead. So the process of continuous improvement helps organisations to make sure this happens as a matter of routine. Customer service is delivered and customer feedback is collected. The customer feedback is used to measure customer expectations and customer satisfaction. The information from the customer feedback is used to find ways of improving the customer service and changes are made.
**Contract Manager**
A manager in an organisation who takes the lead in building and maintaining an ongoing relationship with a corporate customer.

**Core Products and Services**
The basic products and services offered to customers of an organisation, before consideration of any added value products and services.

**Core Service**
A level of service which provides the basic products and services, and will meet some customers’ expectations. It is unlikely, however, to satisfy some customers - because they have experienced better service elsewhere.

**Corporate Customer**
Customer of an organisation who is another businesses rather than an individual.

**Corporate Objectives**
The key achievements which an organisation commits its resources to.

**Cost Benefit Analysis**
A method of assessing and quantifying, where possible, all the costs and benefits to an organisation or team of a particular change. It is often applied to investment decisions where a significant financial outlay is required. All tangible (measurable) costs and benefits should be estimated (usually in financial terms). Intangible costs and benefits are difficult or impossible to quantify - should be identified and listed in the analysis. If the benefits outweigh the costs (giving regard to the intangible ones), then the analysis shows that change is worthwhile.

**Credo**
A statement which sets out an organisation’s values and approach to customer service, often used to guide professionals in their work with customers.

**Customer Based Skills**
The practical skills which are needed to meet and exceed the expectations of customers.

**Customer Centric**
Customer Centric activities are those that focus primarily on customers. Teams that deliver high levels of customer service tend to make many of their activities Customer Centric.

**Customer Charter**
Some organisations choose to tell customers about their Service Offer in a statement of what they will do for the customer and call it a customer charter. Some customer charters set out what the organisation will do to compensate a customer when customer service has not been delivered in line with the charter. A customer charter is a statement of intent and is generally not part of the contract that a service deliverer makes with its customer.

**Customer Expectations**
Customer expectations are what people think should happen and how they think they should be treated when asking for or receiving customer service. Expectations are formed by:
- what people hear and see
- what they read and what the organisation tells them
- what happens during the customer experience
- what has happened to them in other customer service experiences.

**Customer Experience**
Customer experience is what a customer feels and remembers about the customer service that he or she has received. The customer experience of an individual customer service transaction affects the customer relationship and influences customer expectations for the future. When a customer is about to receive customer service his or her customer expectations are influenced by all the customer experiences that he or she has had in the past both with your organisation and with others.
**Customer Feedback**
Customer feedback is information about customer perceptions of customer service collected by the organisation from customers or given to the organisation by customers. Customer feedback can be collected formally using questionnaires or other kinds of surveys. Informal customer feedback can be collected from chance remarks or comments the customer has made with or without being asked.

**Customer Focused Culture**
A Customer Focused Culture applies in an organisation in which the customers (both external and internal) are central to the way the organisation does its business. Consideration of customers permeates the whole organisation, and employees are aware of the critical importance of customer service.

**Customer Focused Processes**
An organisational competence which contributes to excellent customer service. Systems and processes are designed around customers, whether internal or external.

**Customer Loyalty**
Some customers tend to return to the same service deliverer and this is customer loyalty. Obviously customer loyalty can be built up if the customer experience of an organisation has been good. Customer loyalty is valuable to an organisation because it is generally cheaper and easier to do repeat business with an existing satisfied customer than it is to find a new one. Some organisations choose to reward customer loyalty by making special customer service arrangements and offers for repeat customers. Generally customer loyalty means that if an organisation has a problem with a customer there is a better chance of keeping that customer afterwards than there would be with a new customer.

**Customer Relationship Manager**
A manager in an organisation who takes the lead in building and maintaining an ongoing relationship with a corporate customer.

**Customer Satisfaction**
Customer satisfaction is the feeling that a customer gets when he or she is happy with the customer service that has been provided. Some organisations try to increase customer satisfaction and talk about delighting customers or exceeding customer expectations. Most organisations try to increase the number of customers who are happy to confirm customer satisfaction when they give their customer feedback.

**Customer Service**
Customer service is the sum total of what an organisation does to meet customer expectations and produce customer satisfaction. Customer service generally involves service teamwork and service partnerships. Although somebody may take a leading part in delivering customer service it normally involves actions by a number of people in a team or in several different organisations.

**Customer Service Framework**
A strategically planned set of elements which will enable an organisation’s customer service strategy to be successfully implemented. The framework typically includes (amongst other elements) an appropriate organisational structure, an operational plan and a plan for the development of customer service skills and knowledge amongst its employees.

**Customer Service Process**
Customer service processes are the routines and detailed steps an organisation uses to deliver its customer service. Some organisations have formal procedures in writing and use those to train staff and to monitor service. Many smaller organisations do not put their procedures in writing and the procedures are simply seen as ‘the way we do things around here’.

**Customer Service Strategy**
A high level plan for the achievement of customer service excellence by a whole organisation. The strategy will typically include the timeframe and the methods of achieving service excellence.

**Customer Centric Communication**
Any method or channel of communication which focuses first and foremost on the needs of customers.
Customer Expectations
The set of services which an organisation’s customer expects to receive.

Customer Experience
The experience of the individual customer in accessing the services of an organisation. This is critical, because it is often different from the perceptions of the organisation’s employees and managers.

Customer Preferences
Each customer is an individual and customers tend to have different likes and dislikes. Sometimes, in order to deliver consistent customer service an organisation chooses to do things in exactly the same way for every customer. Sometimes it is possible to offer a customer options so that his or her customer preferences can be taken into account in the way the customer service is delivered.

Customer Relationship
A customer relationship forms as the result of a number of individual customer service transactions. Good customer relationships are important to a service provider because they build customer loyalty. This is valuable to an organisation because it is generally cheaper and easier to do repeat business with an existing satisfied customer than it is to find a new one.

Customer Transaction
A customer transaction, or customer service transaction, may be face to face or at a distance by telephone, in writing or by e-mail, and is a single exchange of information, product or service between a customer and a service deliverer. A series of customer service transactions build up a customer service relationship.

Deliver the Promise
Keep to what you and your organisation say you will do.

Diversity
The variation in individual needs and characteristics (which could include gender, ethnic background, skills and personality type for example) amongst customers and team members.

Easy to Do Business With
If the organisational competencies necessary for excellent customer service are in place, then customers will find the organisation easy to do business with.

E-Commerce
Business conducted primarily via the internet.

Ego State
One of three alternative ego states - either adult, child or parent - which people can adopt when interacting with others.

E-Learning
A form of learning which provides content, activates and assessments through an electronic medium such as the internet or a personal computer.

Emotional Intelligence
Emotional Intelligence is the ability to understand your own emotions and those of your customers, and how they can change in different situations.

Empathy
The caring, individualised attention that an organisation provides for its customers.

Environment
One element of a customer service strategy which considers factors external to the organisation, such as changes in the industry, changes in customers’ expectations and new technologies.

Excellent Service
A level of service which means that your organisation is maximising its chances of being the market leader, constantly innovating to find new ways of exceeding customer expectations, with highly skilled and motivated individuals delivering exceptional service to customers. You are consistently attempting to exceed customers’ expectations - every time a customer interaction takes place. This level of service really does consistently deliver the “Wow!” factor.
External Customer
An external customer is a customer from outside the organisation providing a product or service.

Financial Benefits
If the organisational competencies necessary for excellent customer service are in place, then an organisation can build its reputation for service excellence. This in turn leads to customer loyalty, recommendation, repeat and new business, and thereby financial success.

Focus Group
An interactive group discussion led by a facilitator. It tends to be relatively unstructured so that the facilitator can encourage the free flow of ideas.

Gap Analysis
A method of assessing the quality of customer service which measures the gaps between different peoples’ perceptions of service - for example, the gap between employees’ perceptions of how service is delivered and customers’ perceptions of the service they actually receive. Unusually, several different service gaps are analysed so that an organisation can focus on closing the main gaps in order to improve service for customers.

Go the Extra Mile
Trying to exceed customers’ expectations.

Handling Difficult Situations
The strategies and tools which may be used to resolve a range of problems and challenging customer service situations.

Hygiene Factor
In motivation theory, Herzberg (1968) claimed that employees are not generally motivated by the “carrot” (such as money or benefits), nor by the “stick” (such as being reprimanded for not achieving targets). However, hygiene factors, the necessary elements within an individual’s working environment, such as company policies, management and working relationships, need to be present in order for the individual not to be demotivated.

Informal Learning
A wide range of unstructured methods by which an individual can learn, including learning from others, from the media, websites, on-the-job activities and observing and conversing with colleagues.

Integrated Processes
Processes which work together or link together well, so that customers do not suffer from being transferred from one process or person to another.

Internal Customer
An internal customer is somebody from the same organisation as the service provider. They are treated as a customer so that they in turn can provide better customer service to external customers.

Job Enrichment
Providing extra interest, challenge and opportunity for development within an individual employee’s job role.

Keep It Simple
Ensure that customers’ experiences of doing business with an organisation are as straightforward as possible.

Make It Personal
Provide emotional content in service delivery, such as making a customer feel special or giving a customer individual attention.

Mission Statement
A mission statement is a brief statement of the main purpose or mission of the organisation. Many mission statements include commitments to customer service as a central purpose of the organisation in order to provide a focus for staff.
**Moment of Truth**
In any customer service procedure there are several points when customer awareness of the quality of customer service is particularly high. These points have a greater effect on customer perceptions of the customer service they have received. It is usually appropriate to pay particular attention to these moments of truth because they form customer opinions about customer service as a whole. ‘Moments of truth’ means the points in a transaction, service delivery or customer relationship at which customer expectations are at their sharpest and most demanding.

**Motivating or De-Motivating Factors**
The factors which can either increase or decrease an individual’s commitment and enthusiasm for a task. These factors are highly specific to each individual.

**Mystery Shopper**
Acting as an anonymous customer in order to assess an organisation’s service quality. A performance report is normally provided against predetermined criteria, so that the organisation can address any improvements that are needed.

**Negative Delegation**
Delegating repetitive and unchallenging tasks to a team member, not allowing the team member to develop their skills through the delegated tasks.

**One-To-One**
A face to face meeting, often between a manager and team member.

**Operation**
One of the components of a customer service strategy, the operation, or operational plan, usually involves detailed decision-making about resources, employees, processes and structures in the organisation which are needed in order to carry through the organisation's objectives.

**Organisational Competencies**
Applied to service, organisational competencies are the essential capabilities that the organisation as a whole should develop in order to achieve excellent and consistent service delivery for its customers.

**Organisational Culture**
All organisations have their own distinct culture, often easily recognised by customers and employees. For excellent customer service, this culture needs to be closely focused on customers themselves.

**Organisational Self Assessments**
Measurements of the level of performance of different aspects of an organisation, often used in relation to the quality of customer service. Measurement is carried out by the organisation itself.

**Organisational Values**
Organisational values (or corporate values) are statements about the basic principles that an organisation and its employees intend to uphold. They may include standards for how customers will be treated.

**Performance Objectives**
Components of an organisation’s customer service strategy which translate corporate objectives into specific targets, usually for each operational area of the organisation.

**Performance Related Pay**
Reward for employees based in part on the performance of the individual, team or organisation compared with predetermined objectives or targets.

**Personal Qualities**
A service characteristic important for service excellence which includes, for example, being trustworthy, proficient and professional.

**Personal Touch**
The provision of emotional content and/or individualised attention when interacting with customers.

**Personal Vision Statement**
An individual’s written statement of their intentions within their personal life, career and professional development.
**PESTLE Analysis**

PESTLE stands for: Political, Economic, Sociological, Technological, Legal, Environmental.  
PESTLE analysis is used to conduct an audit of an organisation’s environmental influences in order to help plan the strategic direction of the organisation.

**Plan - Deliver - Follow-Up**

A three-stage systematic approach to be followed when delivering service to customers.

**Positive Delegation**

Delegating challenging tasks to a team member, thus allowing the team member to develop their skills through the delegated tasks.

**Problem Resolution**

A generic term for solving a range of customer service breakdowns, challenges and difficulties.

**Product Standards**

Minimum or expected standards of delivery, applied to an organisation’s products.

**Professional Development Plan**

A detailed plan for how an individual will develop their own professional capabilities, knowledge and skills. The plan is normally reviewed and updated on a regular basis.

**Qualitative Research**

The gathering of “soft” feedback (often from customers), which cannot easily be expressed in numerical terms. It could be obtained, for example, from finding out about the opinions of customers.

**Quality Audit**

Auditing or checking an organisation’s performance of its planned processes, often conducted by sampling specific transactions and following their progress through the processes.

**Quality Circle**

A group composed of employees who meet to talk about workplace improvement, often making presentations to management with their ideas, especially relating to product and service quality, in order to improve the performance of the organisation, teams and individuals.

**Quantitative Research**

The gathering of “hard” feedback (often from customers), usually expressed in numerical terms or “facts and figures.”

**Questionnaire Fatigue**

A problem experienced by customers if they are asked to complete too many survey forms. Customers can become tired and cynical about completing the questionnaires.

**Regulator**

Regulation that applies to a particular sector is generally enforced by a person or body appointed as regulator. Restrictions and rules created by the regulator may affect the way an organisation can deliver customer service.

**Reliability**

A service characteristic important for service excellence which includes, for example, always delivering good quality products and promptly delivering the items ordered by the customer.

**Resolve Problems Well**

The practice of resolving customers’ difficulties and problems by responding effectively and swiftly with appropriate solutions.

**Respond - Resolve - Improve**

A three-stage systematic approach to be followed when resolving customer service problems. A key element in the routine is identifying problems’ causes and thereby possible improvements.

**Responsiveness**

A service characteristic important for service excellence which includes, for example, being willing to help customers and provide a prompt resolution to problems.

**Reward and Recognition**

The sum total of monetary and non-monetary remuneration for a job done.

**Risk Assessment**

In order to look after the Health and Safety of customers it may be necessary to carry out a risk assessment. This involves identifying all the risks that may exist and assessing them for
seriousness and for the likelihood of them happening. Health and Safety legislation requires service providers to carry out formal risk assessments in certain circumstances.

**Seamless Service**
The minimisation of the disruption caused by transferring customers between different people, departments or processes.

**Security or Safety Needs**
One of Maslow’s hierarchy of needs which includes, for example, freedom from physical danger and having financial/job security.

**Self-Actualisation Needs**
One of Maslow’s hierarchy of needs which includes, for example, maximising one’s skills and talents, contributing to job satisfaction.

**Self-Esteem Needs**
One of Maslow’s hierarchy of needs which includes, for example, being respected or looked up to others and having self-confidence.

**Service Chain**
The linking together of people and functions within an organisation and its supplier network in order to provide efficiency and seamless service for customers.

**Service Characteristics**
The critical set of competencies and behaviours that are important for service excellence.

**Service Concept**
This important part of an organisation’s customer service strategy spells out the kind of service that the organisation wants to provide for its customers. It should be communicated and thereby help the whole organisation focus on what the organisation intends to achieve in relation to customer service.

**Service Culture**
An organisational competence which contributes to excellent customer service. There is a culture throughout the organisation’s people that focuses on giving excellent service to both internal and external customers. Leaders and managers communicate the organisation’s vision, values, leadership and continuous improvement methods to employees. Employees understand their own role in supporting the service culture.

**Service Delivery Gap**
Any gap between customers’ expectation and the actual delivery of service to them.

**Service Level Agreement**
A statement, in specific and measurable terms, of the levels of service that an organisation will provide and that a customer can expect to receive.

**Service Offer**
A service offer defines the extent and limits of the customer service that an organisation is offering. In commercial organisations the service offer is partly or largely determined by the price that is being charged and by the service offer of competitors. A unique service offer is one that differentiates the offer that an organisation is making from that of its competitors or comparable organisations.

**Service Partnership**
A service partnership can be formed when two organisations or two departments of the same organisation combine in order to provide more effective customer service. Many organisations choose to use the service partnership model to encourage service teamwork and co-operation rather than identifying one party as the internal customer of the other.

**Service Personality**
An organisational competence which contributes to excellent customer service. The organisation has a well-defined personality which defines the particular way it delivers service and interacts with its customers.

**Service Promise**
The service promise is the sum total of service features/offers that a customer has been led to confidently expect from an organisation and its entire staff. It includes both what will be delivered and, more importantly, how it will be delivered. It is important that an organisation
describes this in a way that helps to clarify the promise for staff which will let them know what is expected and unite them in common activity.

**Service Provider**
A service provider is an organisation that provides customer service. Support staff play a vital part in the service teamwork with front line staff.

**Service Recovery**
Resolving problems effectively in customer service, and preferably correcting the cause of the problem to avoid recurrence.

**Service Standards**
Minimum or expected standards of delivery, applied to an organisation’s services.

**Shared Vision**
A clear view of what an organisation intends to achieve, understood by all involved, including the organisation itself, its employees, its customers and its other stakeholders.

**SMART Action Plan**
SMART refers to Specific, Measurable, Achievable, Realistic and Time-constrained actions which make up an effective action list - helpful in making improvements and dealing with changes and problems

**Social Needs**
One of Maslow’s hierarchy of needs which includes, for example, being accepted by one’s colleagues.

**Stereotyping**
Taking a view about the characteristics, capabilities or behaviour of an individual based on a false view of the gender, nationality, culture or other category in which the individual can be placed.

**Submissive Behaviour**
A type of behaviour in which one gives in to other people, putting other peoples’ feelings and wants before one’s own.

**Suggestion Scheme**
An arrangement in a team or organisation which encourages individuals to identify innovations, improvements or simply good ideas. Some such schemes reward those making the suggestions.

**Survival Needs**
One of Maslow’s hierarchy of needs which includes, for example, access to food, water, shelter, warmth, and sleep.

**SWOT Analysis**
A checklist approach to identifying and evaluating the Strengths, Weaknesses, Opportunities and Threats facing an organisation or team. It involves stating the organisation’s or team’s objective(s) and then identifying the internal and external factors that are helpful and unhelpful in achieving the objective(s).

Strengths: attributes of the organisation or team that are helpful to achieving the objective(s).

Weaknesses: attributes of the organisation or team that are harmful to achieving the objective(s).

Opportunities: external factors that are helpful to achieving the objective(s).

Threats: external factors which could damage to the performance of the organisation or team.

**Tangibles**
The physical facilities, equipment, personnel and communication materials provided by an organisation during the delivery of customer service.

**Team Skills Audit**
A systematic checking of the skills present within a team, often then matched against the specific set of skills required in order to deliver customer service.

**Team Synergy**
A benefit of team working in which the total capability of the whole team is enhanced by individuals working together effectively.

**Time Management**
The range of methods by which an individual prioritises and completes tasks in order to meet deadlines.
**Touch-Point**
A single interaction between a service deliverer and a customer. Such a touch-point can be critical in forming the customer’s view of the organisation.

**Transactional Analysis**
Transactional Analysis (TA) is a framework for describing behaviour in an interchange between two people. It can help in understanding why people react the way they do, especially when dealing with difficult customer service situations. TA is one of the best known interpersonal skills models used to individuals’ skills in handling interactions with other people. It originates from Eric Berne’s book in the 1960’s called “Games People Play.”

**Transactional Stimulus and Response**
The transactional stimulus is the initial message sent by one of the participants in an interaction between two people. It could be one of the types: Adult, Child or Parent. This message or stimulus will normally be followed by a transactional response from the other person - which again could be either Adult, Child or Parent in type.

**Understanding Customers**
A service characteristic important for service excellence which includes, for example, taking the trouble to check on a customer’s requirements and understanding the customer’s business.

**Vision Statement**
A description of where an organisation aspires to be in the future. It may describe how the organisation sees itself over a period of perhaps 5 or 10 years if everything goes to plan.

**Weblog**
Often abbreviated to simply “blog,” this is an internet web page or website which acts as a discussion medium, allowing the originator or owner of the blog (the “blogger”) to start discussion topics to which others can respond.

**Win-Win**
The concept that both or all parties to a collaborative arrangement can benefit.

**World Class Service Excellence**
The highest level of customer service achieved by the very best customer service organisations globally.
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