

# CFACC17

## Review and develop customer service procedures for use in a contact centre



---

### Overview

#### What this standard is about

Customer service is at the heart of each contact centre's business. Whether the centre is providing information and support, is involved in sales or is dealing with emergency service support, customer satisfaction with the service is extremely important. Effective customer service relies on clear procedures and guidelines so that those delivering the service know what is expected and can deliver consistent service. Procedures and guidelines must be based on customer satisfaction while taking into account organisational aims and costs. Procedures must cover all routine customer contact but they also need to cover common but more exceptional and non-routine situations.

This standard is about the process of reviewing customer satisfaction and any existing customer service systems and designing comprehensive procedures and guidelines.

# CFACC17

## Review and develop customer service procedures for use in a contact centre

---

### Performance criteria

*You must be able to:*

#### **Identify and agree organisational aims and objectives that impact on customer service delivery in a contact centre**

- P1 Identify organisational business objectives and the contribution made to them by contact centre operations
- P2 Define the service offer of the contact centre and the limits of the services that can be offered
- P3 Classify the types of routine contacts dealt with by the contact centre
- P4 Define the customer service objectives of each type of routine contact
- P5 Classify the most common non-routine contacts handled by the contact centre
- P6 Define the customer service objectives of the main types of exception handled by the contact centre

#### **Design procedures for routine contacts through a contact centre**

- P7 Define the boundaries of each type of routine customer contact
- P8 Plot process charts showing the steps involved in dealing with each type of routine customer contact
- P9 Consult front line staff to identify details of how each step in a routine customer contact should be handled
- P10 Prepare guidelines that set out the organisation's preferred approach to each step in routine customer contacts
- P11 Test and trial procedures and guidelines with stakeholders to ensure that final edited versions are practical and fit for purpose

#### **Design procedures for non-routine contacts through a contact centre**

- P12 Identify the main types of non-routine customer contacts that are common enough or of sufficiently high risk to merit the preparation of guidelines
- P13 Plot the process for each common type of non-routine contact including referral and responsibility points when contacts must be handled by more than one person
- P14 Consult front line staff, relationship managers and others with responsibility for dealing with exceptional contacts to agree details of how each step should be handled

## **CFACC17**

### **Review and develop customer service procedures for use in a contact centre**

---

- P15 Prepare guidelines that set out the organisation's preferred way of handling each step in non- routine customer contacts
- P16 Identify authority levels and limits of discretion for each for each person involved in dealing with non-routine customer contacts
- P17 Test and trial procedures and guidelines to ensure that final edited versions are practical and fit for purposes

# CFACC17

## Review and develop customer service procedures for use in a contact centre

---

### Knowledge and understanding

*You need to know and understand:*

- K1 Details of the services and/or products offered or supported by the contact centre
- K2 Customer aims and objectives when dealing with the contact centre
- K3 Organisational requirements and regulation or legislation that impact on the way contacts can be handled
- K4 Organisational customer service aims and objectives and the service offer of the contact centre
- K5 Definition and presentation methods used for customer service procedures and guidelines within the organisation
- K6 Ways of defining authority boundaries for people dealing with customer service issues and complaints
- K7 Techniques for dealing with complex or difficult customer issues
- K8 How to define a service offer for a contact centre
- K9 Types of customer contact that may be regarded as routine and those that should be seen as non-routine
- K10 Techniques for charting customer service processes as a prelude to devising procedures and guidelines
- K11 The importance of involving operational colleagues in the development of customer service procedures and guidelines
- K12 Approaches to tests and trials of customer service procedures and guidelines

## CFACC17

Review and develop customer service procedures for use in a contact centre

---

**Developed by** CfA Business Skills @ Work

---

**Version number** 1.0

---

**Date approved** May 2011

---

**Indicative review date** May 2014

---

**Validity** Current

---

**Status** Original

---

**Originating organisation** CfA Business Skills @ Work

---

**Original URN** N/A

---

**Relevant occupations** Operator, centre, contact, Adviser, Agent

---

**Suite** Contact Centre 2011

---

**Key words** Contact Centre, customer service, procedure design, organisational aims, guidelines, routine customer contact, non-routine customer contact