

## CFAS9.4

# Build and deliver customer service and customer care support



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### Overview

The unit is about building and delivering customer service and customer care support for key customers served by your organisation.

When taking on new key customers and continuously managing the account structure, it is imperative that there is an internal sales infrastructure to deal with customer requirements on a day to day basis. It is important from a sales perspective to ensure that there is available resource to provide customer service, customer care and sales support.

The aim of this unit is to encourage you to become a customer service champion in your organisation, providing good sales support through a detailed knowledge and awareness of the key components of delivering effective customer service.

This unit is for; Sales Managers, Key Customer Managers and Senior Sales Managers

## CFAS9.4

### Build and deliver customer service and customer care support

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#### Performance criteria

*You must be able to:*

- P1 establish customer needs and expectations relating to sales and customer service support and consider the levels of sales support and customer service provision required
- P2 balance customer needs and wants with your organisation's practices and available resources
- P3 evaluate the needs for technology support within the customer relationship and identify key software packages to aid effective sales support and customer service
- P4 assess the financial implications of providing a particular level of service
- P5 consult customers, sales team members and customer service teams on the level of support and facilities for support of key customer accounts
- P6 identify and nominate key internal support members who will be responsible and accountable for being the organisational point of contact for sales support and customer service issues
- P7 develop customer care programmes for key customers, which clearly outline service provision, service standards and nominated organisational contacts
- P8 establish and maintain communication platforms for all stakeholders from both the customer and sales organisation in order to share information
- P9 develop approaches for managing key customer and sales organisation information, including storing, retrieving and communicating information
- P10 develop joint customer and sales support monitoring and evaluation processes in order to monitor jointly the effectiveness of the relationship
- P11 evaluate and assess the customer relationship for possible risks, problems and issues and prepare contingencies for dealing with those problems should they occur
- P12 ensure a growth in sales through effective management of key customers

## CFAS9.4

### Build and deliver customer service and customer care support

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#### Knowledge and understanding

*You need to know and understand:*

- K1 different methods and ways of managing key customers accounts
- K2 customer needs and expectations in relation to establishing key customer support
- K3 buying behaviour and the different phases of buying decision making and the impact this will have on ongoing purchases by key customers
- K4 the concept of the value chain as a mechanism for identifying primary and support activities for the sales support and customer service functions
- K5 the role of ICT in delivering effective sales support and customer service to key customers
- K6 the various internal and external pressures on buying relationships and how this will impact on sales support and customer service
- K7 the personal pressures faced by buyers within the customer organisation
- K8 how to set up plans for key customers considering business and capability components and ensuring that the sales support and customer service functions deliver effectively
- K9 how to establish sales line reporting to support the customer relationship
- K10 how to set up key customer teams to enable sales support and customer service functions to operate effectively and efficiently to meet key customer needs
- K11 how to motivate the customer effectively and impact positively upon the growth in customer expenditure
- K12 how to develop customer care programmes to meet customer needs and expectations
- K13 how to improve levels of sales support and customer service

#### **Industry/ Sector specific knowledge and understanding**

- K14 legal and regulatory frameworks in your industry/sector
- K15 ethical issues relating to the management of key customers
- K16 competitive issues impacting on the management of key customers

#### **Context specific knowledge and understanding**

- K17 your organisation's sales strategy and sales activity plans
- K18 your organisation's existing practices in relation to providing sales and customer service support for key customers
- K19 ICT used to provide effective sales support and customer service
- K20 internal and external factors that might have a direct impact on the successful management of key customers
- K21 limits of your influence and authority in relation to sales support and customer service support
- K22 how to exploit your organisation's strengths

## CFAS9.4

### Build and deliver customer service and customer care support

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- K23 the overall contribution of sales support teams in providing effective customer service
- K24 the roles of other functional business departments in providing effective customer service support
- K25 potential barriers to sales success
- K26 the skills that staff need to deliver effective customer service support
- K27 proposed budgets for managing key customer accounts
- K28 processes for reporting on the management of key customers
- K29 processes for monitoring and control of key customer accounts

## CFAS9.4

### Build and deliver customer service and customer care support

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#### Additional Information

##### Behaviours

1. you are customer focused at all times
2. you are proactive in the relationship at all times
3. you liaise effectively and frequently with your customer
4. you communicate effectively creating a common sense of purpose
5. you are supportive at all times
6. you balance risk against benefits on an ongoing basis
7. you consult all stakeholders in the relationship
8. you encourage joint customer and sales organisation initiatives in respect of sales and customer service support
9. you deploy resources effectively
10. you display the key attributes of a key customer manager

## CFAS9.4

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**Relevant occupations**  
1132 Marketing and sales managers  
3542 Sales representatives  
7113 Telephone salespersons  
7129 Sales related occupations nec

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**Suite** Sales 2010

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