

## Overview

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

Delivering effective customer service is key to winning and maintaining customer loyalty. You plan and supervise customer service activities, closely monitoring and controlling customer service operations. When problems occur, you deal with them in a way that leaves your customer with a positive impression of your organisation.

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

## Performance criteria

### *You must be able to:*

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

## Knowledge and understanding

### *You need to know and understand:*

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

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Plan, organise and control customer service operations

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