![OCR Oxford Cambridge and RSA logo]

Unit Title:	**Plan, organise and control customer service operation**s
OCR unit number	B13
Level:	4
Credit value:	10
Guided learning hours:	67

Unit purpose and aim

Delivering effective customer service is key to winning and maintaining customer loyalty. This requires careful planning and organisation, followed by close monitoring and control of customer service operations. When problems occur, the learner must be able to deal with these problems in a way that leaves their customer with a positive impression of the organisation. This unit is about managing the delivery of services to the customer.

Learning Outcomes	Assessment Criteria	Knowledge, Understanding and Skills
The Learner will:	**The Learner can:**	Candidates should have an understanding of:
1 plan customer service operations	1.1 analyse customer expectations and define the service offer designed to meet those expectations 1.2 develop specific plans that will ensure sustainable and consistent delivery of customer service 1.3 identify any contingencies that may occur, assess their risks and develop effective plans to deal with them 1.4 plan how they will monitor and evaluate customer service operations	The policies, procedures and practices of their organisation relating to the delivery of services and products to customers. Typical customers of their organisation eg: • internal and external • ages • gender • location • cultural differences • specialist groups. The expectations of their customers eg: • prompt and polite service • availability of products and services • safe and hygienic

			products, services and environment • accurate and up-to-date information • appearance meets organisational profile/image. How to analyse customer expectations and define/plan their organisation's customer service offer, sustainable and consistent delivery, monitoring and evaluation systems and assess and deal with associated risk.
2	supervise customer service operations	2.1	negotiate the availability of people and other resources that they need to implement their customer service delivery plans	Candidates should have an understanding of: The importance of teamwork in delivering high quality customer service. Recognised leadership skills and techniques, consistent with their organisation's customer service delivery policies and procedures. How to negotiate and ensure availability of people and other resources. How to brief staff on objectives and targets, encourage and analyse feedback from them and customers. How to develop measurable, realistic targets for customer service staff and evaluate effectiveness of outcomes. How to use evaluation results to modify customer service operational plans.
		2.2	develop specific, measurable and realistic targets for the staff who deliver customer service	
		2.3	ensure that planned resources are available when required	
		2.4	brief staff on their objectives and targets	
		2.5	encourage feedback from staff and customers and use their feedback to modify objectives and targets	
		2.6	collect and analyse feedback from customers and staff on customer service operations	
		2.7	evaluate how effectively agreed outcomes and processes are being achieved	
		2.8	modify their plans for customer service operations in the light of their evaluation.	
3	deal with problems relating to customer service	3.1	collect information on the nature of the problem and	Candidates should have an understanding of:

operations	assess the likely impact on the customer 3.2 identify the causes of the problem and possible solutions 3.3 evaluate possible solutions against customer expectations and organisational needs 3.4 select and implement an acceptable solution with the minimum possible disruption to customers 3.5 monitor the implementation of the solution and, where necessary, make adjustments	Their organisation's policies and procedures relating to the handling of customer service problems and complaints. How to collect and assess information on the nature of problems arising and their likely impact on customers. Identify causes of problems and possible solutions, in line with customer expectations and organisational needs. How to select, implement and monitor solutions to problems arising and make any necessary changes to customer service delivery procedures as a result.
4 understand how to plan, organise and control customer service operations	4.1 explain how to develop plans for customer service operations and what these plans should contain 4.2 explain how to identify and work within allocated budgets and time targets for customer service operations 4.3 Describe the types of contingencies that may occur during customer service operations, how to assess their risks and plan how to deal with them 4.4 describe the types of monitoring methods that can be used and the criteria they should select to evaluate the effectiveness of customer service operations 4.5 explain how to develop objectives and targets for staff 4.6 explain the importance of briefing staff and how to do so effectively 4.7 explain the importance of monitoring the quality of their customer service operations	Candidates should have an understanding of: The policies, procedures and practices of their organisation relating to the delivery of services and products to customers. Their organisation's policies and procedures relating to the handling of customer service problems and complaints. How to collect and assess information on the nature of problems arising and their likely impact on customers. Candidates must be able to explain: • development and content of customer service operation plans • how to work within allocated budgets and timescales, develop objectives and targets for staff • how assess risks and plan for dealing with them/putting contingency plans in

	4.8 investigate the types of problems that are likely to occur in their customer service operations and how to plan for dealing with these 4.9 explain the importance of liaising with customers and colleagues about problems and possible solutions 4.10 explain how to identify and evaluate possible solutions	place • how to select monitoring/evaluation methods of customer service effectiveness according to organisational policies and procedures • the importance of briefing staff effectively and monitoring the quality of their customer service • the importance of liaising with colleagues and customers on problems and identification and evaluation of possible solutions.

Assessment

Specified in the Customer Service Assessment Strategy 2010

Evidence requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

2. You may collect the evidence for the Unit through work in a private sector organisation, a not‑for‑profit organisation or a public services organisation.

3. You must provide evidence that shows you have done this over a sufficient period of time for your assessor to be confident that you are competent.

4. Your plans must provide evidence that you have taken into account:

- the aims, objectives and targets for your area of responsibility

- your organisation's customer service strategy

- your customers' needs and expectations.

5. Your evidence must show that your plans include consideration of:

- time

- physical resources

- human resources

- financial resources.

6. You must show that you have negotiated with:

- front‑line staff

- supervisors or team leaders

- senior managers.

7. You must provide evidence that you have collected and analysed:

- qualitative information

- quantitative information.

Guidance on assessment and evidence requirements

Please refer to the OCR Customer Service Centre Handbook available from the OCR website: **www.ocr.org.uk**

National Occupational Standards (NOS) mapping/signposting

This unit maps fully to competences outlined in the Customer Service 2010 (Institute of Customer Service) suite of National Occupational Standards.

Additional information

For further information regarding administration for this qualification, please refer to the OCR document *'Admin Guide: Vocational Qualifications' (A850)* on the OCR website **www.ocr.org.uk**