

<b>Unit Title:</b>	<b>Monitor the quality of customer service transactions</b>
Unit number	41
Level:	3
Credit value:	7
Guided learning hours:	47
Unit expiry date:	31/12/2014

### Unit purpose and aim

The quality of customer service transactions must be monitored if they are to benefit from actions to improve that overall quality. Quality in this area can be defined only in terms of agreed criteria and against agreed performance ratings. In an organisation that carries out a high volume of customer service transactions delivered face-to-face, by telephone or on-line, quality can be measured and improved only by adopting a systematic sampling approach. Spot checks and routine checks are needed to observe individual performance and results must be analysed to identify patterns and trends. Improvement can then occur as a result of feedback the learner gives to colleagues so that actions to improve individual performance can be taken. This unit is for the learner if one of their job responsibilities involves systematically sampling the quality of customer service transactions and working with colleagues to improve their performance.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p><b>The Learner will:</b></p> <p>1 Prepare to monitor the quality of customer service transactions</p>	<p><b>The Learner can:</b></p> <p>1.1 Identify the criteria against which quality of customer service transactions will be monitored</p> <p>1.2 Agree a sampling frame for monitoring customer service transactions</p> <p>1.3 Follow organisational procedures to ensure their monitoring plans are compliant with any need for staff and customers to know they are being observed</p> <p>1.4 Identify ratings and scales against which quality of customer service transactions can be measured</p>	<p>Candidates must have a detailed understanding of:</p> <ul style="list-style-type: none"> <li>• The criteria used to monitor customer service transactions</li> <li>• How to select and agree an appropriate sampling frame</li> <li>• Organisational procedures for observing customers and staff</li> <li>• Ratings and scales used to measure transactions</li> <li>• The customer service procedures that are being monitored</li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	1.5 Ensure that they are totally familiar with the customer service procedures for transactions they are monitoring	
2 Monitor the quality of customer service transactions	2.1 Carry out spot checks on or observations of the quality of customer service transactions 2.2 Carry out planned and routine checks on or observations of the quality of customer service transactions 2.3 Observe or listen to a colleague dealing with a customer service transaction 2.4 Record their observations of a colleague's performance against agreed quality criteria 2.5 Make judgements about their colleague's quality of service delivery by allocating a performance rating against a defined and agreed rating scale 2.6 Analyse and summarise their observations to identify patterns and trends in their colleague's performance	Candidates must be able to: <ul style="list-style-type: none"> <li>• Carry out observations to quality assure customer service transactions including:               <ul style="list-style-type: none"> <li>- Routine</li> <li>- Non-routine</li> </ul> </li> <li>• Record observations of performance against quality criteria and make judgements against an agreed rating scale</li> <li>• Analyse and summarise results and identify trends and patterns of performance</li> </ul>
3 Give feedback on the quality of customer service transactions	3.1 Engage with their colleague in preparation for giving feedback on the quality of their customer service delivery 3.2 Provide positive feedback to their colleague by identifying features of customer service that they delivered particularly well 3.3 Give feedback to their colleague regarding features of their customer service delivery that would benefit from development 3.4 Propose actions for coaching or training of a colleague in areas that would improve their customer service delivery	Candidates must be able to: <ul style="list-style-type: none"> <li>• Provide feedback to colleagues in relation to their delivery of customer service including:               <ul style="list-style-type: none"> <li>- Positive feedback</li> <li>- Identification of improvements</li> <li>- Identification of the need for additional coaching/training</li> </ul> </li> <li>• Maintain records of the quality assurance process carried out and subsequent results</li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	3.5 Maintain records of customer service quality monitoring and action plans for improvements	
4 Understand how to monitor the quality of customer service transactions	<p>4.1 Review the criteria against which the quality of customer service delivery is judged in the their organisation</p> <p>4.2 Describe ways to construct a representative sample of customer service transactions in order to monitor quality</p> <p>4.3 Explain the importance of compliance with guidelines about ensuring customers and colleagues know they are being observed to monitor quality of service</p> <p>4.4 Explain how to define ratings and scales against which customer service transactions can be judged</p> <p>4.5 Explain their organisation's procedures and guidelines for customer service delivery</p> <p>4.6 Describe ways to record details of customer service transactions they have observed in order to provide feedback</p> <p>4.7 Describe techniques for analysing and summarising observations in order to identify patterns and trends in customer service delivery</p> <p>4.8 Explain the importance of providing positive feedback to a colleague prior to identifying areas for improvement</p> <p>4.9 Describe sources of information about coaching and training options to improve customer service delivery</p> <p>4.10 Explain the importance of keeping detailed records of coaching and training relating to customer service delivery</p>	<p>Candidates must have a detailed understanding of:</p> <ul style="list-style-type: none"> <li>• The criteria against which the delivery of customer service is judged</li> <li>• How to construct a representative sample to monitor customer transactions</li> <li>• How it is important to have guidelines when monitoring colleagues and customers and making them aware that the observations are taking place</li> <li>• How to define the ratings and scales against which transactions are judged</li> <li>• Organisational procedures and guidelines for delivering customer service</li> <li>• Different methods for recording quality assurance of customer transactions</li> <li>• Techniques used to analyse data and identify trends and patterns</li> <li>• How to feedback to colleagues and the importance of starting with positive feedback</li> <li>• The range of coaching and training options available</li> <li>• Methods for recording coaching and training and why it is important to maintain records</li> </ul>

## Assessment

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This unit is centre assessed and externally verified. In order to achieve the unit you must produce a portfolio of evidence which, on request, will need to be made available to the OCR external verifier. Portfolios of work must be produced independently and Centres must confirm to OCR that the evidence is authentic. An OCR Centre Authentication form is provided in the Centre Handbook.

## Evidence requirements

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In order to achieve this unit you must demonstrate that you have met all of the stated learning outcomes and assessment criteria. Your assessor must be able to observe you in the workplace or you must provide tangible evidence of your real work activities.

You may collect evidence for the unit through work in a private sector organisation, a public sector organisation or a not-for-profit organisation.

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

## Guidance on assessment and evidence requirements

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Please refer to the OCR Customer Service Centre Handbook available from the OCR website [www.ocr.org.uk](http://www.ocr.org.uk)

## National Occupational Standards (NOS) mapping/signposting

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

## Additional information

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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](http://www.ocr.org.uk)