

<b>Unit Title:</b>	Develop a customer service strategy for a part of an organisation
OCR unit number	D16
Level:	4
Credit value:	11
Guided learning hours:	73

## Unit purpose and aim

If organisations want to be consistently successful in customer service over a period of time, they need a customer service strategy. Managers and other senior staff can contribute to this through their knowledge of the organisation's customers and their expertise in customer service. This contribution is also based on what they know of other organisations and published research into trends in customer service. This unit does not assume the learner has full responsibility for their organisation's customer service strategy but that the learner takes a major role in the development of strategy for a particular part of their organisation.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p><b>The Learner will:</b></p> <p>1. research and evaluate their organisation's business and customer service strategy</p>	<p><b>The Learner can:</b></p> <p>1.1 identify their organisation's values, aims and objectives</p> <p>1.2 identify the role of a given part of the organisation in achieving the strategy</p> <p>1.3 evaluate the implications of the strategy for customer service in this part of the organisation</p> <p>1.4 confirm the implications of the strategy for customer service with colleagues</p> <p>1.5 collect information on and analyse customer expectations</p> <p>1.6 match customer expectations with the customer service implications of the business strategy for a given part of their organisation</p>	<p>Candidates should have an understanding of:</p> <p>The strategy, policies and procedures of their organisation relating to the delivery of services and products to customers.</p> <p>The values, aims and objectives of their organisation.</p> <p>How to identify the role of the strategy relating to their part of the organisation.</p> <p>How to evaluate the implications of the strategy for customer service and confirm these with colleagues.</p> <p>The expectations of their customers, eg relating to:</p> <ul style="list-style-type: none"> <li>• prompt and polite service</li> </ul>

		<ul style="list-style-type: none"> <li>• availability of products and services</li> <li>• safe and hygienic products, services and environment</li> <li>• accurate and up-to-date information</li> <li>• appearance meeting organisational profile/image.</li> </ul> <p>How to collect actual information on customer expectations and analyse it, matching these with the business strategy for their organisation/relevant part of it.</p>
2. help to identify current and future best practice in customer service	<p>2.1 identify other organisations which represent models of good practice in customer service</p> <p>2.2 evaluate the key features of customer service in these organisations and the principles that underpin their approaches</p> <p>2.3 identify and analyse current research on trends and developments in customer service</p> <p>2.4 identify and analyse relevant legal and regulatory requirements, codes of practice and ethical considerations</p> <p>2.5 explore the implications of their research for the part of the organisation they are working in discuss the outcomes of their research with colleagues</p>	<p>Candidates should have an understanding of:</p> <p>Different types of organisations offering good practice in customer service.</p> <p>How to evaluate key features of customer service in these organisations and principles that underpin their approach.</p> <p>Current trends and developments in customer service.</p> <p>Relevant legal and regulatory requirements relating to customer service, codes of practice and ethics.</p> <p>How to explore the implications of their research for their organisation/part of it and discuss outcomes with colleagues.</p>
3. identify and recommend the key features of a customer service strategy	<p>3.1 identify values, aims and objectives that are consistent with their research</p> <p>3.2 identify contact processes and channels for customer service that</p>	<p>Candidates should have an understanding of:</p> <p>The key features of a customer service strategy.</p> <p>How to identify values, aims and objectives consistent with</p>

	<p>are consistent with their values, aims and objectives</p> <p>3.3 identify how they will evaluate the effectiveness of the strategy</p> <p>3.4 discuss with colleagues the key features of a customer service strategy</p> <p>3.5 construct a customer service strategy for the chosen part of the organisation and agree it with colleagues and managers</p>	<p>their research.</p> <p>How to identify contact processes and channels for customer service consistent with their values, aim and objectives.</p> <p>How to evaluate the effectiveness of a customer service strategy.</p> <p>Processes in their organisation for discussing key features of a customer service strategy with colleagues.</p> <p>How to construct a customer service strategy for their organisation/part of it and agree it with colleagues and managers in their organisation.</p>
<p>4. understand how to develop a customer service strategy for an area</p>	<p>4.1 evaluate the importance of having a customer service strategy for a given part of the organisation</p> <p>4.2 describe how to access information on their organisation's overall business strategy and analyse its implications</p> <p>4.3 describe sources of information they can use to find out about their customers and their expectations</p> <p>4.4 evaluate the importance of customer loyalty and customer service practices that can help to retain loyalty</p> <p>4.5 explain how to identify other organisations which might represent models of best practice in customer service</p> <p>4.6 describe sources of research on trends and developments in customer service</p> <p>4.7 explain how to develop values, aims and objectives relevant to customer service</p>	<p>Candidates should have an understanding of:</p> <p>How to construct a customer service strategy for their organisation/part of it.</p> <p>How to evaluate the importance of customer loyalty and customer service practices which can help to retain this.</p> <p>Candidates must be able to explain:</p> <p>How to access information on their organisation's business strategy and analyse its implications.</p> <p>Sources of information to find out about their customer and customer expectations.</p> <p>How to identify other organisations offering good practice in customer service.</p> <p>Sources of research on customer service trends and developments.</p> <p>How to develop values, aims and objectives relevant to customer service.</p>

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## Assessment

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Specified in the Customer Service Assessment Strategy 2010

## Evidence requirements

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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. You should be able to identify and analyse the needs and expectations of:
  - existing customers
  - potential or new customers.
5. Your evidence of the approach taken by other organisations may relate to competitors or to organisations that provide similar services or products but are not competitors.
6. The mission, aims, objectives, targets and values of your organisation may be expressed formally or informally.

## 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)