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Unit Title:	**Review and re-engineer customer service processes**
OCR unit number	D19
Level:	4
Credit value:	11
Guided learning hours:	73

Unit purpose and aim

From time to time, a customer process must be subject to review. Most of all, this is because both customer expectations and the general environment change. In addition to this, features of the process evolve as it is operated and the customer service purpose of various details can be lost. This unit is about a systematic approach to reviewing and re-engineering a customer service process. The review seeks a balance of customer satisfaction, cost awareness and compliance with regulation. The review must be undertaken with the agreement and support of those with authority to make changes. It must also take account of the views of those who deliver the process and are in direct contact with customers. This unit is for the learner if they are responsible for reviewing customer service processes. Do not use this unit if the learner does not hold that responsibility and does not have the support of those with authority to make changes.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
The Learner will:	**The Learner can:**	Candidates should have an understanding of:
1. scope the customer service processes to be reviewed	1.1 define the boundaries of a customer service process	
	1.2 agree with the appropriate people the boundaries of the customer service process to be reviewed	The strategy, policies and procedures of their organisation relating to the delivery of services and products to customers.
	1.3 set parameters for the types of change that might be made during the re-engineering	How to define customer service processes in their organisation.
	1.4 communicate with everybody involved regarding the aims of the review	How to agree processes/parts of processes to be reviewed with appropriate people.
		How to set parameters for types of change that might be made and communicate aims of a review with all personnel involved.

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2. analyse the customer service process and identify improvement opportunities	2.1 identify all the key steps in the customer service process	Candidates should have an understanding of: The customer service processes in their organisation and key steps within these and how to analyse each step in fine detail.
	2.2 analyse each step in the customer service process in fine detail	
	2.3 assess each step in the customer service process with reference to customer satisfaction, costs and compliance with relevant regulation	How to assess each step in a customer service process in relation to customer satisfaction, cost and compliance with relevant regulations.
	2.4 raise questions about each step in the current process to establish where there is scope for development and improvement	The type of questions to raise about each step to establish scope for development and improvement and explore these with relevant managers.
	2.5 explore all the questions raised with those involved in the process and their managers	
	2.6 identify options for re-engineering improvements that deserve further investigation	How to identify options for re-engineering improvements deserving of further investigation.
3. evaluate improvement options and re-engineer service processes	3.1 evaluate each option for re-engineering improvements that deserve further investigation	Candidates should have an understanding of: How to identify and evaluate options for re-engineering improvements deserving of further investigation.
	3.2 make and agree recommendations regarding each option that has been evaluated for re-engineering the customer service process	How to make and agree recommendations within their organisation.
	3.3 plan the implementation of agreed recommendations for re-engineering the customer service process	How to plan and implement agreed recommendations within their organisation.
	3.4 implement re-engineering of the customer service process	Appropriate systems for monitoring results of the implementation process.
	3.5 monitor the results of implementing re-engineering of the customer service process	
4. understand how to review	4.1 explain ways to establish	Candidates should have an

and re-engineer customer service processes	boundaries around a customer service process to be re-engineered	understanding of: The customer service processes in their organisation and key steps within these and how to analyse each step in fine detail. How to assess each step in a customer service process in relation to customer satisfaction, cost and compliance with relevant regulations. How to review ways to analyse and assess effectiveness of steps in a customer service process. Candidates must be able to explain: Ways of establishing boundaries around a customer service process to be re-engineered in their organisation and who needs to be involved in the re-engineering process. The importance of communicate with colleagues involved throughout the process. The importance of identifying the right questions to challenge existing processes and monitoring effects of process change. Appropriate techniques for implementing process changes in customer service.
	4.2 describe who needs to be involved in the re-engineering process to ensure that the recommendations can be seen through	
	4.3 explain the importance of communicating with those involved in service delivery when re-engineering the process	
	4.4 review ways to analyse and assess the effectiveness of separate steps in the customer service process	
	4.5 explain the importance of identifying the right questions to challenge existing customer service processes appropriately	
	4.6 describe techniques for implementing changes in customer service processes	
	4.7 explain the importance of monitoring the effects of customer service process changes	

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 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. The 'appropriate people' with who you agree the boundaries of the customer service process to be reviewed must include one or more of the following:

- people in other departments or sections of the organisation

- internal customers

- external customers

- internal suppliers

- service partners

- service delivery colleagues

- line managers.

5. Your plan for implementing agreed recommendations may be formal or informal.

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**