

## Overview

This standard is about managing customer service. You organise employees and resources to deliver customer service in accordance with your organisation's standards. You provide customer service training and support to enable staff to provide service autonomously to specified levels. The standard includes responding to customers who are referred to you, monitoring customer service performance, obtaining feedback and analysing data to identify improvements and recommend changes to processes, systems and standards.

This standard is for all managers and leaders.

## Performance criteria

### *You must be able to:*

1. engage colleagues and stakeholders in managing customer service
2. establish measurable standards of customer service, considering customers' expectations and your organisation's resources
3. organise colleagues and resources to meet customer service standards, taking account of varying levels of demand and likely contingencies
4. measure colleagues competence to ensure they can deliver the required level of customer service
5. provide training, support and supervision to colleagues when required
6. communicate the standards of customer service that colleagues are expected to deliver
7. outline colleagues' level of autonomy for responding to customers' requests and problems
8. respond to customers' requests and problems referred to you
9. seek advice from specialists and/or more senior managers, where necessary
10. keep customers informed about the actions you are taking to deal with their requests and problems
11. obtain feedback on staff and customer perceptions of the standards of customer service your organisation delivers
12. monitor the customer service delivered, customers' requests, problems and feedback against your organisation's standards for customer service
13. analyse your organisation's customer service data to identify the causes of problems
14. identify opportunities for improving customer service based on feedback and monitoring
15. recommend changes to processes, systems or standards to improve customer service
16. follow the legal, organisational, codes of practice and policies relevant to managing customer service

## Knowledge and understanding

*You need to know and understand:*

### General knowledge and understanding

1. how to engage colleagues and stakeholders in managing customer service
2. how to establish clear and measurable standards of customer service, considering customers' expectations and your organisation's resources
3. how to organise staffing and other resources to meet customer service standards, including the importance of taking account of varying levels of demand and likely contingencies
4. the importance of ensuring customer service staff are competent to carry out their duties, and how to provide any necessary training and support
5. the importance of ensuring staff understand the standards of customer service they are expected to deliver
6. the extent of staff autonomy for responding to customers' requests and problems, and when to refer these to a senior staff member
7. the importance of taking responsibility for dealing with customers' requests and problems referred to you, and keeping them informed about the actions you are taking
8. how to monitor the standards of customer service delivered
9. identify and manage potential issues before they develop into problems, customers' requests and feedback (from staff and customers), and the importance of doing so
10. the types of customer service data available and how to analyse it to identify the causes of problems and opportunities for improving customer service
11. the importance of making or recommending changes to processes, systems and standards to improve customer service, and how to do so

### Industry and sector specific knowledge and understanding

12. the industry and sector requirements for the delivery of customer service
13. the legal, organisational, codes of practice and policies relevant to managing customer service

**Context specific knowledge and understanding**

14. your organisation's stakeholders and their interests, and available resources
15. your organisation's customers and their expectations of customer service
16. the types of problems that occur and your organisation's complaints policy and procedures
17. your organisation's staffing in relation to delivering customer service
18. the sources of advice, guidance and support from customer service specialists or more senior managers

## Skills

1. Acting assertively
2. Analysing
3. Communicating
4. Information management
5. Managing conflict
6. Monitoring
7. Obtaining feedback
8. Planning
9. Problem solving
10. Reviewing
11. Team building
12. Thinking with a focus on customers
13. Valuing and supporting members of staff

INSML052

Manage customer service



---

**Developed by** Skills CFA

---

**Version Number** 1

---

**Date Approved** 12 Feb 2021

---

**Indicative Review Date** 01 Mar 2026

---

**Validity** Current

---

**Status** Original

---

**Originating Organisation** Instructus

---

**Original URN** CFAM&LFD3

---

**Relevant Occupations** Managers and Senior Officials

---

**Suite** Management and Leadership

---

**Keywords** Management & leadership; manage; customer service

---