

Unit CU837 Monitor the Quality of Customer Service Transactions

Aims

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.

Level: 3

Credit value: 7

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Prepare to monitor the quality of customer service transactions	1.1 Identify the criteria against which quality of customer service transactions will be monitored 1.2 Agree a sampling frame for monitoring customer service transactions 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 1.4 Identify ratings and scales against which quality of customer service transactions can be measured 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

	<p>2.4 R performance against agreed quality criteria</p> <p>2.5 M quality of service delivery by allocating a performance rating against a defined and agreed rating scale</p> <p>2.6 Analyse and summarise their observations to identify patterns and trends in their</p>
<p>3. Give feedback on the quality of customer service transactions</p>	<p>3.1 Engage with their colleague in preparation for giving feedback on the quality of their customer service delivery</p> <p>3.2 Provide positive feedback to their colleague by identifying features of customer service that they delivered particularly well</p> <p>3.3 Give feedback to their colleague regarding features of their customer service delivery that would benefit from development</p> <p>3.4 Propose actions for coaching or training of a colleague in areas that would improve their customer service delivery</p> <p>3.5 Maintain records of customer service quality monitoring and action plans for improvements</p>
<p>4. Understand how to monitor the quality of customer service transactions</p>	<p>4.1 Review the criteria against which the quality of customer service delivery is judged in 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 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>
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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 with different customers on different occasions for your assessor to be confident that you are competent.

There are no additional evidence requirements other than those expressed within the Unit.