

Unit CU851 Review and Re-engineer Customer Service Processes

Aims

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.

Level: 4

Credit value: 11

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1. Scope the customer service processes to be reviewed	<ul style="list-style-type: none">1.1 Define the boundaries of a customer service process1.2 Agree with the appropriate people the boundaries of the customer service process to be reviewed1.3 Set parameters for the types of change that might be made during the re-engineering1.4 Communicate with everybody involved regarding the aims of the review
2. Analyse the customer service process and identify improvement opportunities	<ul style="list-style-type: none">2.1 Identify all the key steps in the customer service process2.2 Analyse each step in the customer service process in fine detail2.3 Assess each step in the customer service process with reference to customer satisfaction, costs and compliance with relevant regulation2.4 Raise questions about each step in the current process to establish where there is scope for development and improvement2.5 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
3. Evaluate improvement options and re-engineer service processes	<p>3.1 Evaluate each option for re-engineering improvements that deserve further investigation</p> <p>3.2 Make and agree recommendations regarding each option that has been evaluated for re-engineering the customer service process</p> <p>3.3 Plan the implementation of agreed recommendations for re-engineering the customer service process</p> <p>3.4 Implement re-engineering of the customer service process</p> <p>3.5 Monitor the results of implementing re-engineering of the customer service process</p>
4. Understand how to review and re-engineer customer service processes	<p>4.1 Explain ways to establish boundaries around a customer service process to be re-engineered</p> <p>4.2 Describe who needs to be involved in the re-engineering process to ensure that the recommendations can be seen through</p> <p>4.3 Explain the importance of communicating with those involved in service delivery when re-engineering the process</p> <p>4.4 Review ways to analyse and assess the effectiveness of separate steps in the customer service process</p> <p>4.5 Explain the importance of identifying the right questions to challenge existing customer service processes appropriately</p> <p>4.6 Describe techniques for implementing changes in customer service processes</p> <p>4.7 Explain the importance of monitoring the effects of customer service process changes</p>

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:
 - a people in other departments or sections of the organisation
 - b internal customers
 - c external customers
 - d internal suppliers
 - e service partners
 - f service delivery colleagues
 - g line managers.
5. Your plan for implementing agreed recommendations may be formal or informal.