

BS 8477:2014



BSI Standards Publication

Code of practice for customer service

bsi.

...making excellence a habit.™

Publishing and copyright information

The BSI copyright notice displayed in this document indicates when the document was last issued.

© The British Standards Institution 2014

Published by BSI Standards Limited 2014

ISBN 978 0 580 80543 1

ICS 03.080.30; 03.100.99

The following BSI references relate to the work on this document:

Committee reference SVS/0

Draft for comment 13/30270857 DC

Publication history

First edition, April 2007

Second (present) edition, January 2014

Amendments issued since publication

Date	Text affected
------	---------------

Contents

Foreword *ii*

Introduction *1*

- 1** Scope *2*
- 2** Terms and definitions *2*
- 3** Customer service principles *3*
- 4** Customer service strategy and culture *5*
- 5** Resources, people and technology *5*
- 6** Customer service process *13*
- 7** Performance review and improvement *19*

Bibliography *22*

Summary of pages

This document comprises a front cover, an inside front cover, pages i to ii, pages 1 to 22, an inside back cover and a back cover.

Foreword

Publishing information

This British Standard is published by BSI Standards Limited, under licence from The British Standards Institution, and came into effect on 31 January 2014. It was prepared by Technical Committee SVS/0, *Customer service – Fundamental principles*. A list of organizations represented on this committee can be obtained on request to its secretary.

Supersession

This British Standard supersedes BS 8477:2007, which is withdrawn.

Information about this document

This is a full revision of the standard, and introduces the following principal changes:

- a restructuring and thorough update of clauses to bring the standard in line with current customer service good practice;
- additional guidance for smaller organizations and sole traders provided throughout;
- the introduction of a new Clause 5 focusing on resources, people and technology reflecting the current customer experience and the importance of utilizing web sites and web-based systems such as social media.

Use of this document

As a code of practice, this British Standard takes the form of guidance and recommendations. It should not be quoted as if it were a specification and particular care should be taken to ensure that claims of compliance are not misleading.

Any user claiming compliance with this British Standard is expected to be able to justify any course of action that deviates from its recommendations.

Presentational conventions

The provisions of this standard are presented in roman (i.e. upright) type. Its recommendations are expressed in sentences in which the principal auxiliary verb is "should".

Commentary, explanation and general informative material is presented in smaller italic type, and does not constitute a normative element.

The word "should" is used to express recommendations of this standard. The word "may" is used in the text to express permissibility, e.g. as an alternative to the primary recommendation of the clause. The word "can" is used to express possibility, e.g. a consequence of an action or an event.

Notes and commentaries are provided throughout the text of this standard. Notes give references and additional information that are important but do not form part of the recommendations. Commentaries give background information.

Contractual and legal considerations

This publication does not purport to include all the necessary provisions of a contract. Users are responsible for its correct application.

Compliance with a British Standard cannot confer immunity from legal obligations.

Introduction

Meeting or exceeding customer expectations is one of the most important contributing factors in the running of a successful organization in any sector.

This British Standard provides a means by which an organization can judge itself and can be judged by its customers. It provides clearly identifiable and verifiable benchmarks for good practice. It does not, therefore, deal in detail with some of the vital “softer” aspects of customer satisfaction that are less susceptible to this approach.

The ongoing success and development of an organization not only relies on providing reliable good services to the traditional external customer, but also on the need for all organizations to understand the expectation levels and perception of their customers.

Many of the recommendations made in this British Standard are already commonplace in organizations that have a responsive customer service culture. However, where this is not the case the application of this British Standard allows organizations to:

- a) set in place mechanisms to ensure levels of customer service that at least meet the needs and reasonable expectations of customers;
- b) be competitive in the marketplace;
- c) differentiate their services from competitors through providing and maintaining innovative customer services;
- d) increase customers’ positive emotional experience with an organization’s services and, through this, building and maintaining customer loyalty;
- e) increase customer retention;
- f) attract new customers through positive word of mouth;
- g) reduce marketing costs;
- h) increase service efficiency;
- i) reduce problem incidence rates, and therefore reduce time and cost involved in correcting problems experienced by customers and associated complaints that might need to be handled;
- j) maintain and improve services and accountability for public sector service organizations;
- k) create an organization-wide customer-focused approach to developing and maintaining quality services;
- l) improve the ability of customers to deal with an organization.

Customer service culture involves being proactive by anticipating or exceeding customer needs; implementation of this British Standard might for many organizations be the first step in embedding this principle in all aspects of their business and operations.

1 Scope

This British Standard sets out principles for establishing and maintaining an effective customer service culture and mindset in an organization of any size, geographical location or business sector. It also provides recommendations on applying these principles so that the organization has the capability to deliver a consistent standard of service that meets or exceeds the expectations of its customers.

The British Standard is applicable to organizations of all types providing goods or services to customers in person, by phone, by post or online. It is intended to help the whole organization (not only staff involved directly in delivering customer service) understand its role in serving customers.

NOTE In this context "organization" includes sole traders, small businesses and consultancies, business-to-business (B2B) or business-to-customer (B2C), public or private companies, national and local government department and agencies, and not-for-profit organizations. This British Standard could also be applicable to third party providers and suppliers of those organizations.

This British Standard does not include sales practices, although it does cover customer interactions with sales staff.

2 Terms and definitions

2.1 audit

systematic, independent and documented process for obtaining evidence and evaluating it objectively to determine the extent to which specific criteria are fulfilled

2.2 brand

unique product, range or service identity or a specific attribute, production process or service provision

2.3 competency

suitably trained and qualified by knowledge and practical experience, and provided with the necessary instructions, to enable the required task(s) to be carried out correctly

2.4 complaint

expression of dissatisfaction made to an organization, related to its products, services or staff, or the complaints-handling process itself, where a response or resolution is explicitly or implicitly expected

[SOURCE: BS ISO 10002:2004, 3.2]

2.5 customer

organization or person that receives a product or service

NOTE 1 A customer can be internal or external to the organization, e.g. consumer, client, end user, retailer, beneficiary or purchaser.

NOTE 2 For the purposes of this British Standard, the term "customer" includes potential customers.

2.6 customer centered

established around the needs of the customer

2.7 customer relationship management (CRM)

model for managing a company's interactions with current and future customers

- 2.8 customer satisfaction**
customers' perception of the degree to which their requirements have been fulfilled
- 2.9 customer service**
interaction of the organization with the customer throughout the life cycle of a product
- 2.10 customer vulnerability**
condition in which a customer is at greater risk of misselling, exploitation or being put at a disadvantage in terms of accessing or using a service, or in seeking redress
[SOURCE: BS 18477:2010, 2.7]
- 2.11 feedback**
opinions, comments and expressions of interest that contribute to ongoing service quality
- 2.12 key performance indicators (KPIs)**
metrics that are used to assess the effectiveness of a process
- 2.13 management system**
system to establish policy and objectives and to achieve those objectives
- 2.14 objectives**
deliverables required to achieve strategic outcomes
- 2.15 root cause analysis**
method of problem solving that aims to identify the underlying cause of a customer problem or service quality issue, analyse it and fix it to improve future service

3 Customer service principles

3.1 General

3.1.1 In its simplest and most effective form, good customer service should result in the customer's complete satisfaction with the product or service that they have received.

NOTE This includes all sizes of organizations that develop products or provide services, from a sole trader to a large company.

3.1.2 Although the scale of the service might differ significantly across organizations, the key elements of good service should remain the same.

3.1.3 Customer service should include every point of contact between the organization and its customer, including marketing information, sales contacts, web sites, social media as well as customer facing service staff.

NOTE Any customer service point is a vital interface between an organization's customers and its operational delivery units.

3.1.4 In order to establish good customer service the organization should show commitment and credibility to its customers and offer an experience that achieves increased customer satisfaction and loyalty. In order to achieve this the organization should demonstrate commitment to providing effective customer service by all employees within the organization, starting with the board, chief executive officer and top management.

3.1.5 Promises should be kept, service should be delivered at times that suit customers and robust and reliable systems should be in place for every aspect of an organization's transactions with its customers.

3.2 Achieving consistent customer service

3.2.1 The organization should provide customers with a consistent and high level of service that includes:

- a) taking ownership and action;
- b) understanding the needs of the customer and their expectations;
- c) consistency in service, approach, price and staff behaviours;
- d) meeting targets and expectations;
- e) achieving added value, rather than just doing the job;
- f) adopting a flexible approach that takes the different needs of customers into account.

NOTE It might be necessary to:

- 1) understand the emotional connection that customers want to have with the organization's brand;
- 2) study successful and unsuccessful organizations for indications of how they succeed or fail with services.

3.2.2 To achieve consistent and high levels of customer service in any environment the organization should be responsive, efficient and fulfil core customer requirements. The organization should become customer centered to differentiate its service from that of competitors.

NOTE 1 Factors that can influence the interpretation of consistent and high levels of customer service or experiences are:

- a) age or generation;
- b) geography;
- c) nationality or culture;
- d) consistency from third parties or multiple outlets;
- e) emotion;
- f) brand loyalty.

NOTE 2 Common examples of poor customer service are:

- 1) broken promises (including the failure to phone back);
- 2) remoteness of human contact;
- 3) refusal to apologize (even when the organization has clearly made an error);
- 4) failure to respect and empathize with the customer;
- 5) processes and systems that are not customer friendly;
- 6) a reluctance to welcome complaints;
- 7) a lack of openness, honesty and directness;
- 8) hiding behind legislation rather than solving the problem.

4 Customer service strategy and culture

COMMENTARY ON CLAUSE 4

The role of strategy and culture are crucial in achieving consistent and high levels of customer service. Companies that differentiate their products based on good customer service last longer, are more profitable, and attract the loyalty of existing and new customers.

4.1 Strategy

Good customer service strategy should be built around the customer and have the attributes of reputation, performance, growth, profitability and trust at its core.

There are two questions that should be addressed before starting to prepare a customer service strategy:

- a) what level of service does the organization want, or need, to achieve?
- b) what are competitors and other comparable businesses doing and can that be adapted to fit the organization's model?

The organization should identify the objectives required to achieve its strategy.

4.2 Culture

Customer service culture should be specific to the organization. Values should be constantly practised and regularly reviewed by managers and staff at all levels to ensure service is both consistent and improving. The organization should:

- a) understand what level of service it is that the organization wants, or needs, to achieve. The organization is not solely in the customer service business and should use customer service as a way to help to sell and service primary revenue generators;
- b) understand how to apply quality management techniques to improve quality of service, processes and measurements;
- c) ensure visibility of customer retention and whether new customers are being recommended or referred;
- d) encourage ideas and innovation to keep developing and enhancing products and services; and
- e) develop measures that give continual feedback on how to improve the customer service model.

NOTE The concept of the internal customer is an important element in developing a customer service culture.

5 Resources, people and technology

5.1 Resource planning

5.1.1 The organization should identify the people and other resources needed to promote a high quality customer service culture and to deliver effective and efficient customer service outcomes. This assessment should take into account the forecast activity levels and should specify when the resources are needed. It should also include any additional resources required to identify and meet the specific needs of customers in vulnerable circumstances who might be disadvantaged due to difficulties in accessing or using the service.

NOTE 1 Resources include people, training, procedures and processes, technology, facilities, equipment, materials and finance.

NOTE 2 For further information on customers in vulnerable circumstances see BS 18477.

5.1.2 The organization should develop and activate a plan which specifies:

- a) the number of people, with appropriate skills, that need to be recruited and trained in each time period;

NOTE In a micro or small business this may be a regular review of the person or persons with recruitment and training as a function of their overall responsibilities within the team.

- b) all other resources that need to be procured or made available and the associated timescales.

5.2 People

5.2.1 Leadership and management

5.2.1.1 The system for direction, control and accountability of customer service performance should be established by the organization's leadership.

5.2.1.2 The organization's leadership should:

- a) be visibly committed to customer service through establishing, communicating and demonstrating a commitment to service values and excellence at all levels within the organization;
- b) advocate for the customer and put the customer at the heart of service delivery;
- c) facilitate interdepartmental support and cooperation;
- d) establish clear accountabilities and goals for customer service;
- e) designate a senior manager, with sufficient authority to achieve the desired customer service outcomes, as being responsible for the development and maintenance of a customer service culture.

NOTE In a small or micro business these activities may be the responsibility of the owner.

5.2.1.3 The designated senior manager with responsibility for customer service should:

- a) communicate the vision and values to all staff, key suppliers and contractors;
- b) identify and assign customer service responsibilities;
- c) ensure that sufficient finance and resources are identified and allocated to enable the delivery of effective and efficient customer service;
- d) ensure that actions are implemented and measurements agreed to allow the progress toward the agreed goals to be monitored, and corrective action taken to address any variances;
- e) ensure that all employees are aware of their role and responsibilities; the implications for them of their organization's customer service culture; the benefits for them of working within and supporting that culture, and the consequences of not doing so;
- f) ensure that there is always adequate trained supervision of staff and/or volunteers engaged in customer service roles.

NOTE In a small or micro business these activities may be the responsibility of the owner.

5.2.2 Customer service staff: competency profiles

5.2.2.1 Those with direct customer service responsibilities should have the appropriate behaviours, attitudes, knowledge and skills to deliver high quality customer service.

5.2.2.2 The organization should develop person specifications for each of its customer service roles which reflect the nature of their work and their level of interface with customers. The person specifications should be based on the requirements and responsibilities identified in each job description and should clearly identify the attributes (i.e. behavioural competencies, knowledge and skill) needed to complete customer service tasks to a satisfactory level.

NOTE For small businesses the person specifications would need to reflect the wider range of duties undertaken by each individual.

5.2.2.3 Customer service staff should be helpful, friendly, value the customer, have a positive attitude and a commitment to the organization's mission and values. Behavioural competencies required for customer service roles should include:

- a) quality focus;
- b) clear and effective communication;
- c) handling stress;
- d) listening actively;
- e) working as part of a team;
- f) problem solving and initiative;
- g) flexibility;
- h) being proactive.

5.2.2.4 Skills, knowledge and experience required for customer service roles should include:

- a) a thorough knowledge of the organization's products and structure or the capacity to quickly acquire this knowledge;
- b) an ability to empathize with the customer;
- c) an understanding of the needs of the customer;
- d) the capability to convey information clearly to the customer;
- e) additional expertise or technical skills required for a specific customer service role (e.g. for call handling, complaints handling or social media communications).

5.2.2.5 Recruitment, training, development and performance assessment of customer service staff should be based on the agreed competency profile for the role.

5.2.3 Recruitment and training

5.2.3.1 A variety of recruitment techniques and selection processes should be used (e.g. telephone interviewing for staff who take orders over the phone) that highlight candidates who meet the customer service competency profile and fit with the organization's ethos and service vision.

5.2.3.2 Those with direct customer service responsibilities should be fully trained at the outset and regularly updated on the organization's products and services, including prices, features and benefits. Training should also include:

- a) what consistent and high levels of customer service means to their customers and how to deliver it;
- b) use of the organization's systems, procedures and processes;
- c) skills and knowledge required for specific customer service roles;

NOTE Knowledge includes product information and other any criteria which the customer needs to fulfil in order to receive the service or limitations on the availability of the service e.g. requirements for minimum age, skills.

- d) complaints handling, service recovery and dealing with difficult customers;
- e) how to identify and respond to the needs of customers in vulnerable circumstances, including people with particular disabilities such as visual or hearing impairment or learning difficulties.

5.2.3.3 Those with direct customer service responsibilities should receive continued training, development and support to ensure the quality of service offered to customers and that the information they are given is of an appropriate standard. Ongoing training and coaching should cover matters such as communication, problem solving, handling specific customer situations and teamwork. The training provided should be evaluated and the support given should be documented.

NOTE Development and support includes ongoing training, education, coaching, mentoring and counselling.

5.2.3.4 Those with direct customer service responsibilities should, where appropriate to the needs of the business, be encouraged to undertake relevant professional qualifications and should be provided with ongoing coaching and development.

5.2.4 Authority and empowerment

5.2.4.1 The organization should ensure that those with direct customer service responsibilities possess the necessary responsibility, authority, information and resources to enable them to:

- a) meet the customers' needs;
- b) take ownership for ensuring that the customers' problems are solved.

5.2.4.2 Customers should be given ready access to a person who has appropriate authority to make decisions.

5.2.5 Staff performance

5.2.5.1 The organization should actively promote the development and embedding of a customer service culture among all of its employees by adopting measures to enhance employee motivation, such as:

- a) incorporating customer service performance in every job description;
- b) using incentives (monetary and non-monetary) to reward employees who demonstrate commitment to the organization's customer service ideals; and
- c) linking performance pay to achievement of customer service obligations.

5.2.5.2 The organization should:

- a) ensure that all employees understand their personal customer service responsibilities and those of their business unit;

- b) encourage employees to take responsibility for customer service and to take ownership of resolving the customer's problems;
- c) empower individuals to be flexible in their handling of customer relationships outside a standard framework; and
- d) provide employees with ways of alleviating stress and avoiding burnout.

5.2.5.3 The organization should ensure staff are:

- a) aware of and carry out their roles, responsibilities and authorities in respect of customer service;
- b) valued and supported to deliver high quality customer service;
- c) encouraged to work as part of a team;
- d) empowered and encouraged to promote a customer focused culture.

NOTE Support and encouragement can be provided by colleagues, team leaders, managers and owners. Encouragement of customer focused behaviours can be achieved through:

- 1) *recognition;*
- 2) *positive reinforcement and reward of desired behaviours;*
- 3) *coaching;*
- 4) *mentoring;*
- 5) *team meetings;*
- 6) *one-to-one meetings with their line manager; and*
- 7) *staff appraisals and feedback.*

This list is not exhaustive.

5.2.5.4 Competencies of staff should be assessed on an ongoing basis through the use of a combination of techniques including:

- a) examination;
- b) testing;
- c) observation;
- d) peer review;
- e) role-play;
- f) records review; and
- g) testimonials.

5.2.6 Customer interface

5.2.6.1 The organization should ensure staff conduct their dealings with customers in a friendly and helpful manner.

5.2.6.2 The organization should ensure that staff who deal with customers face-to-face are suitably dressed and readily identifiable by customers.

5.2.6.3 The organization should ensure that staff who visit customers' homes or business premises provide the customer with proof of identity on arrival.

5.2.7 Problem resolution and service recovery

5.2.7.1 When dealing with a customer to resolve a problem, the organization should ensure customer service staff:

- a) clearly empathize with the customer; and

- b) advise the customer of the action, if any, to be taken and the timescales for investigating and resolving the problem.

5.2.7.2 Where the problem involves a repair, the customer should be given an estimate of the time to fix the problem and an estimate of the cost. The organization should ensure staff establish whether this is acceptable to the customer and obtain the customer's approval before commencement to avoid any misunderstandings.

5.2.7.3 The organization should ensure that the customer is kept informed of progress during the investigation and repair process. Where possible, the problem should be fixed quickly and fully: first time and on time. If the problem cannot be fixed quickly, the options available to the customer should be clearly explained.

5.2.7.4 When the problem has been resolved, the customer should be provided with a clear explanation of the cause of the problem, the work that was done and advice on what the customer could do to prevent the problem occurring again. The customer should be given a record of the repair work that was done, and all relevant documentation and receipts.

5.2.7.5 When the problem has been resolved, the organization should ensure staff carry out a root cause analysis of the issue to understand how it happened and determine any remedial activity that should be implemented to minimize the likelihood of any re-occurrence. The cause and outcome should be communicated to senior management.

5.2.8 Support staff and contractors

The organization should establish mechanisms to ensure that:

- a) the competence of contractors and others (paid, unpaid and volunteers) working for or on behalf of the organization is taken into account in the selection and appointment process; and
- b) the performance of internal departments, suppliers and other third parties providing services to the customer are maintained at the required level.

NOTE Internal departments providing services to customers might include marketing, sales, logistics, billing and administration, finance, debt collection and recovery. Suppliers and other third parties might include manufacturers, installers, delivery contractors, agents and partners. Mechanisms used to specify performance levels might include formal contracts, service level agreements, response times and quality targets.

5.3 Technology

5.3.1 Use of technology

5.3.1.1 The organization should assess whether implementing supporting technology is likely to improve efficiency and help deliver more consistent and higher levels of service to its customers. Where a business need and benefit can be demonstrated, the organization should determine and deploy the hardware, software, electronic or manual systems and other technology which best meets the needs of the business and its customers.

NOTE Systems might include:

- a) customer relationship management (CRM), including billing, data/records, reporting, product/service delivery, work scheduling/appointments, cash collection, payment and debt collection;
- b) monitoring and measurement;

- c) *customer contact and communications including telephony, correspondence handling and social media;*
- d) *web-based services and applications;*
- e) *intranet and employee information;*
- f) *portable or hand held terminals and other field-based technology; and*
- g) *customer record book.*

5.3.1.2 The technology used by the organization should:

- a) be appropriate for the size and type, or sector, of business, and the type of product or service provided;
- b) have sufficient functionality, capacity and resilience to support the organization's business needs and meet customer expectations;

NOTE 1 This might be through computing resources held on or off-site, or accessed through a provider of networked cloud computing services.

- c) be designed around the customer with the user in mind; and
- d) incorporate appropriate measures to protect personal data and ensure the security and privacy of customer information (e.g. firewalls, anti-virus protection, cryptographic techniques, passwords, ID verification, secure payment systems).

NOTE 2 See BS 10012 for further information on personal data protection systems.

5.3.2 Customer relationship management (CRM) and reporting systems

The organization should develop and deploy CRM system(s) appropriate to the size and structure of the business, and processes which support and coordinate customer contact through all of the organization's channels and facilitate related activities (e.g. billing, data/records management, reporting, product/service delivery, work scheduling/appointments, cash collection, payment and debt collection). The CRM system(s) and processes should:

- a) ensure that sufficient text and/or visual information is captured at the point of customer contact to enable the required action to be taken to resolve the problem without the need to contact the customer for further details;
- b) ensure that all information relating to customers, products and services, is easily accessible to authorized people;

NOTE Customer information can be structured (e.g. held in customer databases) or unstructured (e.g. letters, forms or other documents).

- c) provide tools and information which help the customer service staff to deliver better service to the customer;
- d) provide customer service staff with easy access to an expert knowledge base holding the information required to resolve issues raised by customers;
- e) enable issues, problems and complaints which cannot be resolved satisfactorily at the first point of contact to be quickly referred to staff with the appropriate knowledge, expertise and authority;
- f) provide management information and reporting; and
- g) support outbound contact with the customer, including marketing calls and automated emails or text messages to acknowledge contact from the customer or to provide further information (e.g. of a planned appointment or payment due date).

5.3.3 Customer contact systems: telephony

5.3.3.1 The organization's telephony systems should incorporate features which enable the customer to contact the relevant person or department within the organization easily and quickly.

NOTE 1 Features of the telephony system might include:

- a) *automated information and response;*
- b) *call queuing and messaging (e.g. to advise customer of expected wait);*
- c) *intelligent call routing;*
- d) *interactive voice response or voice recognition;*
- e) *message handling and call back options; and*
- f) *call recording.*

NOTE 2 See also BS EN 15838 for more information on customer contact centres.

5.3.3.2 Where calls are answered by an answering service, voicemail or message handling service, customers should:

- a) be informed when to expect a call back if they choose to leave a message;
- b) have the option to speak to a person rather than an electronic answering service;
- c) be given information on alternative ways to contact the organization; and
- d) if feasible, be given an alternative telephone number to call if the person they are trying to contact is not available.

5.3.3.3 Where voice response or recognition systems are used, the menu of choices should be simple for customers to use and should:

- a) provide clear instructions to the customer on how to talk directly to staff;
- b) be capable of handling contacts from customers with a variety of accents;
- c) enable the call to be quickly switched to staff where the system is unable to recognize the customer's instructions;
- d) provide analysis of problems experienced by customers using the system so that remedial action can be taken; and
- e) provide analysis of the reasons for calling.

5.3.4 Customer contact systems: alternative channels

5.3.4.1 The organization should provide customers with at least one alternative contact channel including, letters (postal or fax), face-to-face and web-based systems.

NOTE Web-based systems might include email, social media (e.g. blogs), live webchat, dedicated apps or other emerging channels. Other emerging channels might include the use of:

- a) *"how to" videos to support customer service operations in self-service channels or direct staff-to-customer video interactions to assist problem resolution; and*
- b) *virtual assistants or digital characters, using advanced text recognition and speech generation techniques to support and assist web visitors to navigate their way through interactions.*

5.3.4.2 The organization's web sites and web-based systems should:

- a) allow customers to contact the organization outside of normal working hours when other contact channels might not be available;
- b) utilize formats, interfaces, software and protocols which are readily accessible by customers;
- c) enable the organization to provide a consistent and high standard of handling customer interactions through a range of alternative contact channels;
- d) enable customers using these alternative contact channels to easily and quickly switch to speaking directly to an appropriate staff member in the organization;
- e) be accessible;

NOTE 1 See also BS 8878 for further information on web accessibility.

- f) provide, or signpost the customer to, adequate and up-to-date information for a customer to make an informed decision;
- g) have a search engine;
- h) enable the customer to purchase a product, make an appointment or answer their own questions without the need to contact the organization; and

NOTE 2 Web site content or functionality might include: purchasing and payment; appointment booking; delivery tracking, frequently asked questions; interactive knowledge bases, help functions, customer reviews or an ask a question facility which enables customers to obtain information from the organization, from designated third parties or from other customers.

- i) be fully optimized for mobile/smart phone access.

5.3.5 Customer feedback systems

Organizations should establish feedback systems to provide:

- a) real-time or rapid insight into customer experience to enable early action to be taken to address issues that are causing frustration; and
- b) input to support ongoing service and quality improvement.

NOTE Systems can include reviewing feedback received by the organization directly from its customers and by monitoring of relevant social media channels or third party web sites which capture customer reviews.

6 Customer service process

6.1 General

The customer service process should be designed to make sure that customers receive appropriate, consistent and high levels of service wherever possible.

NOTE 1 Appropriate service includes:

- a) removing hazards, and precautions to reduce the impact of a failure in some aspect of service provision;
- b) policies, procedures, instructions and equipment to maintain customer service in emergency situations until normal service can be resumed;
- c) attention to environmental issues including reduction of waste, odours, noise, pollution and conservation issues;
- d) compliance with relevant industry or professional codes; and

- e) *ensuring that service is safe, environmentally friendly, fair and accessible.*

The customer service process should connect customer facing business areas with those business areas that support the organization's wider delivery of customer service.

NOTE 2 For example, where a billing department is involved in the provision of data to contact centre staff to assist them in the resolution of customer queries or where the warehouse staff need to make sure customer orders are correctly distributed.

Customers should be kept informed of the employee or department, where possible, that has ownership for delivery of the requested service or product. If a problem or complaint occurs, customers should be advised of the employee or department that owns the resolution process.

Organizations should review opportunities for proactively contacting customers to minimize or prevent the impact of a problem or to provide important information (e.g. proactively notifying a customer to advise them of a possible service delay and advising of alternative options).

6.2 Access to service

6.2.1 Both contact hours and contact channels (phone, email, post or social media) should meet customers' expectations.

NOTE 1 Where emergency call outs are necessary, customer service might need to be available 24 hours a day.

NOTE 2 Customer service accessibility is concerned with what is convenient for the customer rather than for the organization (within reasonable cost and logistic constraints).

NOTE 3 Use of non-standard rate telephone numbers could increase the cost to the customer and restrict the availability of the organization's service, especially when customers are calling from mobile phones.

6.2.2 A process should be in place to ensure that the potential range of customers is taken into account.

NOTE 1 The range of customers might include children, older people or those with different abilities, including different languages or different expectations derived from their cultural backgrounds.

6.2.3 Organizations should make available information, assistance and opportunities to report problems in whatever languages or formats are appropriate for the customer.

Information should be provided:

- a) in clear and unambiguous language;
- b) in alternative formats such as audio, large print, large raised letters and braille;
- c) by email, or on an accessible web site for people who are visually impaired;
- d) by a textphone number as an alternative for people with a hearing impairment; and
- e) in an appropriate language for communities where English is not the first language.

NOTE 2 See BS 18477 for further guidance on responding to customer vulnerability, including procedures and resourcing.

6.2.4 Customers should have ready access to a person within the organization who has authority to make decisions. Customers should be informed as to how

to report any problems or complaints, including information on the range of options available, such as service counters, telephone services (including opening hours) and written and online services (email and direct online).

6.3 Managing customer expectations

6.3.1 General

Customers should be given information on the customer service quality they can expect, and on how the customer service process works.

Additional goods and services, which the customer has not requested and which require the customer to specifically "opt out" of their purchase, should not be included in the transaction.

Timelines reflecting customers' reasonable expectations should be established and regularly reviewed for:

- a) dealing with customer enquiries;
- b) processing customers' orders;
- c) delivering goods and services;
- d) meeting appointment times; and
- e) acknowledging and dealing with complaints.

Customers should also be provided with a prompt interim response if any unavoidable delay is likely to occur.

NOTE Customers' "reasonable expectations" are dependent on the product or service that they are purchasing e.g. a ticket bought on the internet might be expected to arrive the next day whereas a handmade fully fitted kitchen might be expected to take several weeks.

6.3.2 General provision of information to customers

Any information provided to customers about products or services should be:

- a) comprehensible (e.g. plain language, formatting and diagrams appropriate to the customer) and the use of complex and technical language, abbreviations and jargon avoided;
- b) easily accessible (e.g. opening hours, web site, helpline number, email helpdesk);
- c) clear in providing contact details for any further enquiries;
- d) in formats readily available to customers (e.g. large print, audio cassettes) and capable of being easily sent to or accessed by them;
- e) tailored to the specific needs of customers to ensure that it is useful to them;
- f) accurate, clear and concise in conveying details about the scope of the service or product provided;
- g) up-to-date, including information about when it was last updated;
- h) clear in specifying whether it is only relevant to certain situations, such as, a nominated time period, specific geographic areas or certain types of customers;
- i) capable of being easily stored by the customer; and
- j) free from any misleading and ambiguous material.

6.3.3 Pre-purchase

Any pre-purchase information should include, as a minimum, information about the service provided by the organization to allow customers to make decisions in terms of:

- a) price;
- b) value for money;
- c) conditions of sale and use;
- d) options available and suitability for particular needs and limitations (e.g. age, disability, different cultures and languages);
- e) reliability; and
- f) quality of service.

6.3.4 Order, purchase, delivery and billing

The organization should provide readily available and accessible information to potential customers as to how to place an order, including information on the range of options available, such as service counters, telephone services and written and web-based services (email and direct online).

Information about the order, purchase and delivery stages of services should include as a minimum:

- a) explanations and associated costs, if relevant, where there is more than one option of service delivery;
- b) explanations about order confirmation, different payment options and associated costs and processes available (e.g. e-payments, deductions from account);
- c) details of internal complaint procedures and any external dispute resolution mechanisms; and
- d) what the customer is to do if they need assistance (e.g. helplines, online forums) or any necessary follow-up information.

NOTE 1 Typically, follow-up information includes matters such as confirming arrangements, providing estimates, sending information, providing a progress report or requesting clarification. Further information needs to be relevant and timely.

Processes should be set in place and monitored to ensure that orders are fully processed and completed within a set timeline. Changes to the orders should be confirmed and documented. Customers should be informed of revised delivery dates when delays occur.

NOTE 2 Reasonable practice in respect of confirming orders varies according to the type of business and the means by which orders are placed. In some instances verbal confirmation is sufficient, in others there might be a need for electronic or written confirmation.

NOTE 3 Information related to payments might include invoices or statements on aspects such as whether service charges, taxes, delivery charges etc. are included. For services such as telephones or energy, unit price information might be needed.

NOTE 4 Modes of payment might include cash, vouchers, debit or credit card and electronic funds transfer. The mode of payment includes those appropriate for the service being delivered with clear indication of where an expected payment method is not available and any surcharges related to specific methods of payment. Customers might prefer to have a choice of payment methods.

NOTE 5 Conditions might include information on the time period for part or full payment for the service, provision for independent holding of large sums (e.g. deposit for house purchase) and information on whether taxes or gratuities are to be added. Reference can be made to the organization's complaints procedure and provision for external dispute resolution.

NOTE 6 See BS ISO 14452 for further information on billing practices.

The prompt identification of delivery problems and warranty issues should take account of the following:

- a) establishing comprehensive details of cause(s);
- b) undertaking investigation and resolution of issues through initial urgent corrective action; and
- c) a detailed review and examination of issues that led to the problem and the incorporation of preventive action into future processes.

NOTE 7 See 6.4 for further information on corrective and preventative action.

6.3.5 In-store or counter service

Where specific in-store or counter service is provided:

- a) systems should be in place (e.g. signage, helpdesks, opening hours) to help customers meet their needs;
- b) customer service areas should be easy for customers to find and access, and be clean and well maintained;
- c) any queuing arrangements should be prompt and fair; and
- d) customers should be attended to in a reasonable time

NOTE This might mean that additional staffing arrangements need to be in place for predictable peak periods.

6.3.6 Telephone service

Any telephone service should be designed to be quick, convenient and easily accessible in accordance with the following recommendations:

- a) the contact number for enquiries should be easy for customers to find (e.g. in phone books, web sites, handout material);
- b) contact hours should be convenient for customers;
- c) calls should be answered within a reasonable time;
NOTE 1 Good business practice defines a "reasonable time" as no more than three to five rings.
- d) processes should be in place to ensure quick and effective follow-up action;
- e) where calls are to be answered by an answering service or voicemail that requires the customer to leave a message, timelines should be set in which to return the calls;
- f) customers should have the option to speak to a person rather than an electronic answering service;
- g) voicemail should give an optional phone number for the customer to call, if feasible; and
- h) where outbound service calls are made, equivalent procedures should be developed and implemented.

NOTE 2 Convenience and immediate accessibility are features of telephone contact that often dictate why customers choose to use telephone rather than deal with a business face-to-face.

6.3.7 Online services

Online services (e.g. web site, social media sites) should conform to current industry good practice.

Customer service processes for online channels should be in accordance with 5.3.4.

6.3.8 Customer appointment service

6.3.8.1 Before an appointment

Convenient visiting hours should be agreed with the customer. If the visit is delayed, immediate contact should be made with the customer to advise of the delay.

The customer should be provided with a contact number for reference, in case the customer has any queries regarding an appointment. The customer should also be provided with the name and contact details of the employee or department with whom the appointment has been made.

Where the customer needs to do anything or make any preparation in advance of the appointment, they should be given clear and timely advice.

The customer should be given an indication of the time to be taken for work carried out during the appointment and when it is to be completed.

6.3.8.2 The appointment

On arrival, proof of the identity of the organization being represented should be given to the customer. At the beginning of the appointment, there should be a discussion with the customer as to what work is involved.

The work should be carried out with minimum disruption to the customer. The customer should be kept informed of progress during the visit, especially if the customer has to leave the premises at any time during the visit.

At the end of the appointment the customer should receive confirmation and explanation of what was undertaken, a record of the visit, and contact details for any further queries.

The premises should be left at least in the condition it was in at the commencement of the service.

6.3.9 After-sales service

6.3.9.1 General

After-sales service should include a visible and accessible complaint handling process, which is known to all parties and is easily accessible through a variety of media.

Emergency call out services should be available, if applicable.

6.3.9.2 Customer support

Customers should be informed as to how to request service or report a product problem, including information on the range of options available such as service counters, telephone and textphone services and written and online services (email and direct online). Where an immediate response is needed, this service should be available 24 hours a day. In response to a problem report, the customer should be provided with a reference number and a contact number to call should there be any queries during the customer support process. The process involved in providing the required service or product support should be explained to the customer.

The organization should develop and implement procedures covering response to problems experienced by customers, including the actions to be taken by customer service staff as given in 5.2.7.

NOTE Things customers value in customer support situations include:

- a) *having confidence in what is being done;*
- b) *the speed of delivering support (e.g. completing a product repair);*
- c) *an estimate of the time and costs involved;*
- d) *concern being shown for their situation;*
- e) *having a clear contact point and being kept informed of progress; and*
- f) *being advised what they can do to help avoid the problem recurring.*

6.4 Corrective and preventative action

Corrective and preventative action should, where required, be part of an internal complaint procedure or customer support mechanism and should include:

- a) correction by immediate resolution of the reported problem;
- b) preventative action taken to avoid recurrence of similar problems in the future; and
- c) assessment and agreement of appropriate redress, including signposting to any independent relevant dispute resolution body.

NOTE 1 It is vital to minimize the impact of problems on the customer and, where such problems occur, to deal with them as efficiently as possible from the customer's point of view.

NOTE 2 For further information on management of complaints see 7.7, for control of non-conformity and corrective action see BS EN ISO 9001 and BS ISO 10002.

7 Performance review and improvement

7.1 General

Organizations should adopt a system that monitors and measures performance.

The business performance should be routinely reviewed to ensure:

- a) key performance indicators (KPIs) are met; and
- b) constant improvements and corrective actions are undertaken to maintain and improve customer confidence and employee motivation.

All information on performance should be recorded and assessed in order to see what actions are required to maintain and improve customer service.

NOTE 1 For guidance on quality management systems for continual improvement see BS EN ISO 9004.

NOTE 2 Changes or developments in technology appropriate to the business might be considered for incorporation to maintain competitive advantage.

7.2 Feedback sources

Information for performance review should be gathered from the following sources:

- a) customer feedback (see 7.3);
- b) employee and volunteer feedback (see 7.4);
- c) audits and regular management checks/monitoring (see 7.5); and

d) complaints and redress mechanisms, including ombudsmen, etc. (see 7.7).

NOTE 1 Customer complaints are a common indicator of low customer satisfaction but their absence does not necessarily imply high customer satisfaction.

NOTE 2 Even when customer requirements have been agreed with the customer and fulfilled, this does not necessarily ensure high customer satisfaction.

7.3 Customer feedback

Customer feedback should be obtained through one or more of the following:

- a) focus groups;
- b) customer satisfaction surveys; and/or
- c) other established methods e.g. recommendations, advice or social media sites.

Customers' perception of the organization relative to its competitors should be assessed. In small or micro businesses direct customer contact by the owner or their designated representative should be carried out, if appropriate.

NOTE 1 See 5.3.5 for more information on customer feedback systems.

Customers should be encouraged to provide feedback whenever the customer service experienced has been perceived to be excellent. Procedures should be in place to inform and recognize those employees that delivered the excellent service.

NOTE 2 Customer feedback helps to identify business delivery that:

- 1) exceeded expectations;
- 2) met with expectations; and
- 3) failed to meet expectations.

7.4 Employee and volunteer feedback

Employee and volunteer feedback, particularly that of customer contact employees, should be obtained either through team meetings, regular focus groups (if possible using expert facilitation), the use of internal survey questionnaires or conversations with staff. Employees and volunteers should receive feedback on action taken on their suggestions. In a small or micro business regular team meetings should be used to obtain employee or volunteer feedback.

Customer service employees should be regularly monitored/checked (e.g. through mystery shopping), to ensure that they are meeting a consistent and high level of customer service. They should also feedback, when issues arise, to senior management.

7.5 Audits

Audits should be undertaken to evaluate the performance of the customer service process.

NOTE The audit could be undertaken as part of a quality management system audit where such a system is in place.

7.6 Benchmarking and innovation

Benchmarking should be used to compare the organization's customer service quality with competitors and organizations in related and other industries.

The results of benchmarking should be used to identify areas where improvement or innovation is needed, drive change and monitor customer service quality.

7.7 Complaints

A robust and auditable complaints handling system should be established, which also provides feedback for performance reviews.

Customers should be provided with clear information on how and where to escalate any unresolved complaints. Customers should also be advised, where relevant, of appropriate external redress mechanisms when the internal complaint procedure has been completed.

NOTE See BS ISO 10002 for further guidance on complaints handling.

Bibliography

Standards publications

For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

BS 8878, *Web accessibility – Code of practice*

BS 18477, *Inclusive service provision – Requirements for identifying and responding to consumer vulnerability*

BS 10012, *Data protection – Specification for a personal information management system*

BS EN 15838, *Customer contact centres – Requirements for service provision*

BS EN ISO 9001, *Quality management systems – Requirements*

BS EN ISO 9004, *Managing for the sustained success of an organization – A quality management approach*

BS ISO 10002, *Quality management – Customer satisfaction – Guidelines for complaints handling in organizations*

BS ISO 14452, *Network services billing – Requirements*

British Standards Institution (BSI)

BSI is the national body responsible for preparing British Standards and other standards-related publications, information and services.

BSI is incorporated by Royal Charter. British Standards and other standardization products are published by BSI Standards Limited.

About us

We bring together business, industry, government, consumers, innovators and others to shape their combined experience and expertise into standards-based solutions.

The knowledge embodied in our standards has been carefully assembled in a dependable format and refined through our open consultation process. Organizations of all sizes and across all sectors choose standards to help them achieve their goals.

Information on standards

We can provide you with the knowledge that your organization needs to succeed. Find out more about British Standards by visiting our website at bsigroup.com/standards or contacting our Customer Services team or Knowledge Centre.

Buying standards

You can buy and download PDF versions of BSI publications, including British and adopted European and international standards, through our website at bsigroup.com/shop, where hard copies can also be purchased.

If you need international and foreign standards from other Standards Development Organizations, hard copies can be ordered from our Customer Services team.

Subscriptions

Our range of subscription services are designed to make using standards easier for you. For further information on our subscription products go to bsigroup.com/subscriptions.

With **British Standards Online (BSOL)** you'll have instant access to over 55,000 British and adopted European and international standards from your desktop. It's available 24/7 and is refreshed daily so you'll always be up to date.

You can keep in touch with standards developments and receive substantial discounts on the purchase price of standards, both in single copy and subscription format, by becoming a **BSI Subscribing Member**.

PLUS is an updating service exclusive to BSI Subscribing Members. You will automatically receive the latest hard copy of your standards when they're revised or replaced.

To find out more about becoming a BSI Subscribing Member and the benefits of membership, please visit bsigroup.com/shop.

With a **Multi-User Network Licence (MUNL)** you are able to host standards publications on your intranet. Licences can cover as few or as many users as you wish. With updates supplied as soon as they're available, you can be sure your documentation is current. For further information, email bsmusales@bsigroup.com.

BSI Group Headquarters

389 Chiswick High Road London W4 4AL UK

Revisions

Our British Standards and other publications are updated by amendment or revision.

We continually improve the quality of our products and services to benefit your business. If you find an inaccuracy or ambiguity within a British Standard or other BSI publication please inform the Knowledge Centre.

Copyright

All the data, software and documentation set out in all British Standards and other BSI publications are the property of and copyrighted by BSI, or some person or entity that owns copyright in the information used (such as the international standardization bodies) and has formally licensed such information to BSI for commercial publication and use. Except as permitted under the Copyright, Designs and Patents Act 1988 no extract may be reproduced, stored in a retrieval system or transmitted in any form or by any means – electronic, photocopying, recording or otherwise – without prior written permission from BSI. Details and advice can be obtained from the Copyright & Licensing Department.

Useful Contacts:

Customer Services

Tel: +44 845 086 9001

Email (orders): orders@bsigroup.com

Email (enquiries): cservices@bsigroup.com

Subscriptions

Tel: +44 845 086 9001

Email: subscriptions@bsigroup.com

Knowledge Centre

Tel: +44 20 8996 7004

Email: knowledgecentre@bsigroup.com

Copyright & Licensing

Tel: +44 20 8996 7070

Email: copyright@bsigroup.com



...making excellence a habit.™