



CUSTOMER SERVICE EXCELLENCE



For more information please contact the SGS Customer Service Excellence Team on [01276 697 715](tel:01276697715).

FOREWORD

Welcome to the SGS handy guide to Customer Service Excellence (CSE), the national standard for customer service.

This guide is designed for new applicants, existing holders and those looking to extend scope or train new champions.

The guide covers the entire journey from deciding to go for Customer Service Excellence, the implementation process and finally the application and certification process. The final part of the guide is a full copy of the Customer Service Excellence standard, including a handy planning section as well as guidance on the type of evidence required.

This booklet is also available in other formats at www.sgs.co.uk/cse

This is enabled (if the technology is still the same) through the use of the zoom tool allowing the text to be readable at very large sizes, without distortion and with the use of Tab-Space navigation and hotkeys.

The booklet is also available in text format which can be read very easily by major text reader applications for the blind and includes buttons for next and previous pages, and links to all the other pages.

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INTRODUCTION TO SGS

The SGS Group is the clear global leader and innovator in inspection, verification, assessment and certification services. Founded in 1878, SGS is recognized as the global benchmark for the highest standards of expertise and integrity. With more than 94,000 employees, SGS operates a network of over 2,600 offices and laboratories around the world. We are constantly looking beyond customers' and society's expectations in order to deliver market leading services wherever they are needed. Working together to make the world a better, safer place.

We have an extensive network of accredited assessors with experience of many thousands of customer service assessments.

SGS is a Cabinet Office approved and UKAS accredited assessment body for the Customer Service Excellence standard. In addition to Customer Service Excellence, SGS is an accredited certification body to standards such as ISO 9001 (Quality Management Systems), ISO 14001 (Environmental Management Systems), ISO 45001 (Occupational Health & Safety), ISO/IEC 27001 (Information Security Management).

SGS works extensively in the public, private and third party sector with clients in universities, local authorities, the civil service and the NHS. In addition SGS works with clients across all industries within the private sector.

SGS enables organizations to use CSE to drive continual improvement, greater increase the use of corporate programmes, policy and activity - keeping the focus on the customer in service design and delivery. Our assessment services embed the principles of excellence at the heart of your service delivery and the very culture of your organization.

1. ELIGIBILITY

All UK businesses and organizations can apply for certification to the Customer Service Excellence standard. This means that commercial and third party sector organizations can apply and reap the benefits that many public service organizations enjoy.

Successful organizations can use the CSE hallmark to demonstrate their achievement and more information on the mark can be found at www.customerserviceexcellence.uk.com

*Please contact SGS for advice if you have overseas branches.

2. YOUR FIRST STEPS

We would strongly recommend contacting our Customer Service Team at the earliest opportunity to discuss the most suitable method of applying for Customer Service Excellence. The Customer Service team will then give you guidance on the requirements of the application process.

In addition we can supply you with a proposal outlining costing, give details of assessment timescales and the fees to take you from application to Customer Service Excellence certification.

For most organizations the first internal action is to bring together an implementation team. The team will champion the project within your organization or service and it is worth drawing on expertise from various levels including front-line staff.

To assist your team we can provide a range of training courses and workshops including Awareness and Internal Assessor Training.

We have also developed a road map to Customer Service Excellence certification with SGS. [Click here to download your copy.](#)

3. TIPS FOR SUCCESS

Gather a team together – this is vital. You need a group to champion the process and share responsibility for completing the application together and planning improvement activity. It is a mistake to try to do the application on your own.

Evidence – Gather together evidence that is naturally arising not artificially assembled. Validate perceptions about your service delivery with internal and external evidence. Remember you do not need to submit a piece of paper for every element of the standard! Remember – use the SGS self-assessment checklist at this stage to monitor your progress against meeting the standard.

Action plan – Tackle the jobs to be done in the form of an action plan so that you are clear about the what, who and when of your approach. Use the SGS self-assessment checklist to record actions as you go along.

Identify your strengths – Remember to record the good practice you already have in place.

Going the extra mile – Be on the lookout for examples of where staff have exceeded expectations to meet customer needs and improve the quality of delivery.

Steering or focus groups – Actively engage customer and staff representatives who should act as both guide and sounding board. They can also assist in the co-ordination of the process.

Application – Use bullet points to explain how you meet the elements of Customer Service Excellence; you do not need to compose pages and pages of text. Keep it concise and relevant and make sure your evidence is collated and indexed in a user-friendly way.

Starting point – Criterion 1 – It sounds obvious but understanding your customer base and associated groups is fundamental to achieving Customer Service Excellence.

Continuous improvement – Improvement is the name of the game, not a one-off, Oscar-winning type performance. Put in place systems and procedures to ensure your service is upward moving.

Celebrate success – On the Customer Service Excellence journey, celebrate success. Tell your staff and customers; through newsletters, posters, meetings or the media. SGS can help with certificate presentations and other events, including press releases etc.

4. THE CUSTOMER VOICE

The government standard for Customer Service Excellence builds on the legacy of the Charter Mark standard that had been used by public, private and third party sector organizations to improve their customer service.

The fundamentals of good customer service remain the same and underpin the Customer Service Excellence standard.

In addition it will test in greater depth those areas that customers have indicated are a priority for them. In particular it focuses on delivery, timeliness, information, professionalism and staff attitude. There is more emphasis on developing customer insight, understanding their experience and robust measurement of service satisfaction. Organizational culture, leadership, and excellent customer experience are at the heart of the standard.

5. UNDERSTANDING YOUR CLIENT BASE

The starting point of Customer Service Excellence is a clear understanding of your current and potential customer base. This is the fundamental requirement of criterion 1.1.1 of the standard.

We strongly recommend that you first develop segmentation or grouping exercise for your main customer groups; this should then be referred to throughout your application. Assessors will regularly review how you have adapted practice, from consultation to service delivery, to meet the needs of these specific groups. To assist with this we have included a page in the self-assessment checklist, where you can summarize your main customer groups and also identify if they are hard to reach or disadvantaged groups.

The following definition might help you:

Hard to reach groups – Groups that may be (or feel) excluded from access to services that they need due to their personal circumstances and/or previous experiences.

Disadvantaged groups – Groups that find it more difficult to access services, often due to a combination of linked issues.

Segmentation – Subdividing a target audience into homogeneous and reachable groups based on shared needs and characteristics, such as:

- who they are (socio-demographics)
- what they do (their behaviours)
- how they think and feel (their attitudes and needs)

6. EVIDENCE

Evidence for a Customer Service Excellence application typically comes in three formats:

Descriptive – This is where you describe in a few paragraphs what activity or actions you have taken to meet the requirements of a particular criterion.

Supportive – Additional evidence that could be a brochure, report or electronic information that supports the descriptive evidence given above.

Observed – This is evidence that can be gained on site, such as activities around a reception area or display of information to staff and customers.

For each element of criterion an applicant would normally submit descriptive evidence then reference either supportive or observed evidence. For example Clause 1.3.2 of the Customer Service Excellence standard states “We analyse and publicise satisfaction levels for the full range of customers for all main areas of our services and we have improved services as a result.” Here the descriptive evidence could be a short bullet point explaining how you analyze and interpret satisfaction level management.

Supportive evidence could be copies of the analysis plus publicity material leaflets. But you could also just say “See on site” and then the observed evidence would be the assessor speaking through the analysis with relevant team members, then looking at the publicized information and then speaking to some customers about improvements they have seen in the service.

It is important that you only include supportive evidence that is “naturally arising”. If it is something that is better viewed during a site visit then just mark “see on site”.

7. THE APPLICATION PROCESS

SGS' approach is designed to give organizations the greatest added value to their assessment. This enables the organization to drive continuous improvement to their services via the assessment and reporting process.

The assessment process is fairly predetermined but can include:

- An optional gap-analysis. This option establishes the readiness of the service prior to formal certification assessment.
- The submission of an application and supporting evidence using the SGS self-assessment toolkit.
- SGS' named assessor will 'score' the application.
- The application can be reviewed on or off site.
- SGS' named assessor will provide a pre-assessment feedback report to the service following this stage. The assessor will contact the applicant to discuss particular areas they wish to consider at the on-site assessment and provide information on areas of current non-compliance.
- The on-site assessment visit will take place and the assessor will verify your evidence through engagement with staff, stakeholders and customers.
- At the end of the assessment visit, the assessor will give a recommendation decision during the closing meeting.
- The assessment decision will be verified and the Customer Service Excellence Certificate awarded.
- If the decision at this point is not to award CSE then discussions will take place regarding Areas for Improvement.
- The service will then develop an action plan to meet the requirements of CSE including timelines.
- Discussion will take place with SGS to schedule the reassessment, this is NOT a full reassessment, but a review of additional information required to meet the criteria, which may or may not be conducted on site.

SGS' approach is to have the pre-assessment of the submission as a separate stage from the on-site assessment with a gap of typically 4 weeks between them. This enables the applicant to have breathing space and digest the document review feedback report prior to the on-site assessment. This is an example of how the SGS assessment process is designed to give you continuous feedback.

REPORTING

The SGS assessment approach allows organizations to submit evidence in any format and in fact we encourage services to keep the evidence in its “natural” state. That is to say if it is held on the intranet then do not print it out as we can review it in situ.

Hyperlinks to web or intranet pages can easily be included on our self-assessment toolkit.

It is also important to note that we do not expect organizations to upload information to a separate website etc.

A detailed report of the findings is then prepared; this includes areas where the organization was partially compliant as well as areas of compliance plus.

If unsuccessful the organization can use the report to help guide them through the elements that need addressing. Once the organization has implemented the issues raised in the report we will reassess those areas again.

If the organization is successful we will issue a certificate and letter announcing the achievement of Customer Service Excellence.

In addition we can offer you PR support and issue a press release to relevant local and national media. There is no additional charge for the issue of the press release.

SCORING MECHANISM

During the assessment process, the Customer Service Excellence criteria are scored on a four-band scale:

Compliance plus – Behaviours or practices that exceed the requirements of the standard, and are viewed as exceptional or as an exemplar for others – either within the applicant’s organization or in the wider public, private and third party service arena.

Compliant – Your organization has a variety of good quality evidence that demonstrates that you comply fully with this element.

The evidence that reflects compliance is consistent throughout and embedded in the culture of the organization.

Partial compliance – Your organization has some evidence but there are some significant gaps. The gaps could include:

- parts of the applicant organization that are currently not compliant and/or areas where the quality of the evidence is poor or incomplete and/or
- areas that have only just begun to be addressed and are subject to significant further development and/or
- areas where compliance has only been in evidence for a very short period of time.

Non-compliant – Your organization has little or no evidence of compliance or what evidence you do have refers to only a small (minor) part of your organization.

Pass mark – The current scheme allows applicants a maximum number of partial compliances that equates to a pass mark of 80% for all criteria. No non-compliant areas are allowed.

The maximum number of partial compliances for each criterion is given below.

CRITERION	NUMBER OF ELEMENTS	MAXIMUM NUMBER OF PARTIAL COMPLIANCES
1	11	2
2	11	2
3	12	2
4	13	3
5	10	2

ONGOING ANNUAL REVIEW

Meeting the Customer Service Excellence standard is not just a one-off activity as the standard has been designed to drive continual improvement. The SGS assessment process is also designed to help organizations develop and improve their customer service during what is often a changing internal and external environment.

Each year we will carry out an on-site annual review of your organization to ensure your continued compliance with the standard. Prior to your next review we ask you to read and complete the review form.

BUILDING ON YOUR CUSTOMER SERVICE EXCELLENCE SUCCESS - PREPARING FOR THE ANNUAL REVIEW

This will provide the assessor with information to help guide the structure of the review and enable an itinerary to be developed (please ensure that the form is returned to your assessor one month prior to the booked review date).

SGS' view is that the Customer Service Excellence standard should become embedded within the way certificated organizations operate and their culture. In line with this, the SGS approach to annual review will focus on your overall customer service provision rather than a requirement to complete an element by element self-assessment document. This holistic approach reduces the work required by an organization to specifically prepare for the annual review. It gives the assessor time to review your service in line with the customer's experience by using the customer journey methodology.

ELEMENTS TO BE ASSESSED

As part of the itinerary your assessor will notify you of the elements of the standard that will be assessed during the annual review. There is no requirement to complete a self-assessment for these but please ensure the assessor is either able to review evidence on the day or see activity in practice. The elements are listed in appendices in 'Building on your Customer Service Excellence success. Preparing for the Annual Review'. They include all the elements required to be assessed annually (see Appendix 1) and a selection of elements which are not likely to be reviewed during the customer journey assessment (see Appendix 2 – all to be covered over the 3-year cycle).

RENEWAL ASSESSMENT

Every three years we are required, under accreditation requirements, to undertake a renewal assessment. This enables the certificate to be reissued for a further 3 years. The SGS approach to renewal is for the assessor to review all previous assessment reports to ensure the service continues to meet requirements of the standard and that there are no significant trends emerging.

They must also check that all elements of the standard have been covered over the 3 years and that the stated number of sites in scope requiring an onsite assessment have been visited during the 3-year cycle. This SGS method of continuous assessment removes the need to apply in full for Customer Service Excellence at any point and if the service is continuing to meet the requirements of the standard, they will remain holders.

8. OPTIONAL SERVICE

SGS is available to offer assistance and guidance throughout the life of the contract through various options. These can cover interpretation of the standard and advice on assessment planning.

- **Training** – SGS has a dedicated Academy service that provides a wide range of courses on both a public and in-house basis, such as accelerated learning, blended learning and interactive virtual training.
- Through this service we are able to provide a wide range of courses including a 1 day awareness workshop, 2 day internal assessor and half-day seminar.
- **Online training** – SGS has also developed a publicly run webinar: 'An Introduction to Customer Service Excellence'. The response to this webinar and the delegate feedback has been excellent and we now offer these as bespoke training solutions for organizations. The use of webinars allows organizations and individuals to gain the same knowledge they would from a seminar, without the need to travel. We can provide your delegates with access to webinars anywhere in the world – all you need is an internet connection. EONI staff can attend the webinar as a live event or can register to receive a recording of the webinar, to watch as and when their time permits.
- **SGS CSE guide** – SGS has produced a unique guide to help our clients achieve the Customer Service Excellence standard. The SGS CSE guide contains a full copy of the CSE criteria, and additional guidance against each element of the standard, written by SGS assessors.
- **Assessor support** – We will allocate a project leader/lead assessor who will be your first point of contact for any questions or queries on any aspect of the standard, assessment process or planning.
- **Gap analysis** – This can be tailored to your needs but typically this is a one day on-site visit that is undertaken once you have developed the first draft of your application. The gap analysis is designed to give you information and feedback on how you are progressing as well as identifying suitable levels of evidence and any gaps that become apparent.

9. CORPORATE APPLICATIONS

As part of the Cabinet Office drive to put Customer Service Excellence at the heart of public, private and voluntary sectors customer service, SGS is keen to assist large organizations adopt a corporate approach. This can enable an organization to make substantial savings in both money and time when applying, as well as giving the entire organization a Customer Service Excellence ethos.

An SGS Corporate programme is bespoke to each organization. If you are thinking of a corporate programme then please make contact with your Sales Executive to request an executive briefing at your office.

10. BENEFITS OF SGS

- Expertise is provided from 45 sites based in England, Northern Ireland, Scotland and Wales, enabling us to react quickly to your requirements and offer you a truly local service.
- Applicants are offered a flexible approach to assessment, allowing us to tailor our service to your particular needs.
- We believe that getting to understand your organization is vital at an early stage. Therefore, we offer applicants a visit by one of our dedicated team members as the first step on the path to gaining Customer Service Excellence. The visit is free of charge and enables us to advise the best assessment method for your organization.
- For small to medium sized applicants we are able to minimize the amount of effort required in producing the application pack by putting greater emphasis on the site visit.
- Your Sales Executive will ensure a worry-free path to Customer Service Excellence certification. We will send you a detailed proposal outlining the SGS fees for the assessment. These fees are presented with clarity and there will be no hidden fees.
- As a large global organization, with experience in developing assessment processes within complex organizations, SGS has the expertise to assist larger applicants and develop bespoke corporate programmes.
- Ongoing action planning aligns with existing planning techniques.
- SGS can facilitate integration with a number of additional national and international standards during implementation and assessment.

11. SUMMARY OF THE STANDARD

The following pages include a summary of the five pillars of the Customer Service Excellence standard.

Discover the positive impact of the standard from organizations who have achieved this award by downloading case study material at www.sgs.co.uk/cse

HOW DOES IT WORK AND WHAT ARE THE BENEFITS?

Customer Service Excellence is designed to operate on three distinct levels:

1. As a driver of continuous improvement. By allowing organizations to self-assess their capability, in relation to customer-focused service delivery, identifying areas and methods for improvement.
2. As a skills development tool. By allowing individuals and teams within the organization to explore and acquire new skills in the area of customer focus and customer engagement, thus building their capacity for delivering improved services.
3. As an independent validation of achievement. By allowing organizations to seek formal certification to the Customer Service Excellence standard, demonstrate their competence, identify key areas for improvement and celebrate their success.

CRITERION 1 – CUSTOMER INSIGHT

This criterion focuses on the importance of developing an in-depth understanding of your customers. This includes consulting customers and using the information you receive to design and provide services. It also covers the importance of monitoring the outcomes of your services and whether customers are satisfied with them.

Understanding customers in this way is essential for public, private and voluntary services to enable the development of a customer-focused culture. Organizations that provide public services have raised their standards and levels of service and continue to build on this success. Effectively identifying your customers, consulting them in a meaningful way and efficiently measuring the outcomes of your service are a vital part of this approach. It is not just about being able to collect information. It is about having the ability to use that information, and developing a culture within your organization that values this kind of understanding and constantly looks to improve.

CRITERION 2 – THE CULTURE OF THE ORGANIZATION

The transition to a customer focused culture can be challenging but at its core is a business model based on a detailed understanding of customers. In building a customer-focused culture, organizations look at how those that work within the organization demonstrate the necessary values and understanding, as well as how the operations and procedures meet customer needs and expectations.

This criterion is therefore concerned with the support for customer focused approaches throughout the organization so that excellent service is delivered to all customers. Also included here are two of the key drivers relating to staff behaviour – professionalism and attitude. These have been brought together and reinforced by a requirement that this approach is fully supported by the leadership team.

Taken together these elements help to build and develop a customer-focused culture that supports improved service delivery.

CRITERION 3 – INFORMATION AND ACCESS

We know that information is vital to customers. They particularly value accurate and detailed information, and this criterion aims to make sure that we have this in mind in everything we do. As a result, we need to focus on making sure that we consider this as part of an effective communication strategy for consulting and involving customers, rather than seeing communications as a one-off exercise. Customers also tell us that one of the most frustrating parts of all service interactions is not being kept informed about what is happening. Because of this, we ask you to particularly look at this part of your communication policy.

Putting customers first can be an important first step towards providing effective communication.

CRITERION 4 – DELIVERY

A vital part of any organization is how successfully it achieves its main business aims. This is, of course, also very important to the customers of those organizations. As a result, this criterion relates to how you carry out your main business, the outcomes for the customer, and how you manage any problems that arise.

Research shows that many customers are satisfied with the outcome of their contact with public, private and voluntary services but fewer are satisfied with the way the service kept promises and handled any problems. Handling problems in particular often receives one of the lowest ratings out of all the different areas measured. Research has shown that learning from mistakes and comments is an important way for public, private and voluntary services to gain trust from their customers. Listening to, and asking for, comments, feedback and complaints about your service is a great way to make positive adjustments to the way your organization operates, and both formal and informal feedback can be equally important.

CRITERION 5 – TIMELINES AND QUALITY OF SERVICE

This criterion looks in more detail at the standards you have relating to how you carry out your main business. It draws heavily on what public-service users have identified as the most important factors of excellent customer service. Separating customer service standards from the main business standards makes the requirements for setting and monitoring standards in these areas much stricter. This plays a major part in developing the customer-focused culture discussed in criterion 2.

What is covered here is not meant to be a full list of every factor that affects how you run your service. Clearly, local factors will also be important but we know from research that the speed of your initial contact with the customer and your ability to keep to agreed timescales are vital. However, because organizations can sometimes focus on providing a speedy service while forgetting to also consider quality, we have combined both these factors here.

NOTES

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