Deliver and monitor a service to customers

Learner Guide

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1. Identify customer needs

1.1 – Use appropriate interpersonal skills to accurately identify and clarify customer needs and expectations

Delivering customer service

Delivering excellent customer service sits right at the heart of any organisation that provides products or services to customers, whether those customers are private individuals (i.e. members of the public) or corporate or public sector organisations. Every organisation has a customer – that is, an end user of their products or services, or a person or organisation which pays for the products or services. Since the interpretation of 'customer' can vary widely depending on the context of the organisation and the products and services provided, we are going to use the example of a hairdressing and beauty salon to illustrate the different aspects of delivering an monitoring a service to customers (for the purposes of this guide). The principles and concepts described in this guide can be applied in any other context where service is being provided to a customer.

The first step in delivering good quality service is knowing what the customer wants. One internet trader received a poor feedback rating from a customer which simply read 'Not what was wanted.' This was confusing for the trader, as the customer had selected and paid for the item, didn't contact the trader with any queries or special requirements, and didn't explain to the trader why they were unhappy with what they had received.

In this instance, the trader didn't really understand what the customer wanted and the customer hadn't communicated their requirements. Then, they were disappointed with what they received but failed to communicate the reasons for this to the trader. This was undoubtedly frustrating for the customer as they bought and received an item they didn't want, but it was equally frustrating for the trader as they didn't know why the customer was unhappy (despite asking them) and weren't able to learn from the experience and put things right.

The key ingredient that was missing in this example was communication – with effective communication, the trader would have been able to understand the customer's requirements and either take steps to meet them, or tell them that they were unable to help.

A successful customer/supplier interaction has the following key steps:

➢ The customer's needs are identified through effective communication

➢ The products/services are delivered according to what was agreed with the customer

➢ The customer's satisfaction is established or action is taken to rectify any problems, if necessary.

Having a very clear understanding of the customer's needs and expectations is absolutely vital in the delivery of good quality service. Unless you know what the customer wants, it can be very difficult (if not impossible) to deliver a service which meets their expectations – it's a bit like finding one's way across a room in the dark without falling over and bumping into things!

Customer needs and expectations may include:

- ➤ Accuracy of information

- ➤ Advice or general information

- ➤ Complaints

- ➤ Fairness/politeness

- ➤ Further information

- ➤ Making an appointment

- ➤ Prices/value

- ➤ Purchasing organisation's products and services

- ➤ Returning organisation's products and services

- ➤ Specific information.

Whatever needs they have, there are some simple, effective and practical steps that can be taken to establish these.

This relies on the good use of effective interpersonal skills to:

- ➤ Listen to what the customer says

- ➤ Ask questions to check you understand what they want

- ➤ Ask for the customer's feedback to confirm that you both agree on what is required

- ➤ Summarise and paraphrase the customer's requirements

- ➤ Use appropriate body language.

Let's look at each of these factors in turn:

Listen to what the customer says

Listening sounds easy – we've been doing it since we were born and it's likely that we've never been shown how to listen properly. However, effective 'active' listening is more than just passively hearing what the other person has said. Active listening is really listening closely and giving the other person your full attention. It is impossible to listen actively when looking at a mobile phone, glancing out of the window or thinking about what you're having for supper later.

To listen actively, it is important to:

➢ Stop everything that you are doing and look at the customer

➢ Make eye contact to let the customer know that you are listening and to enable you to pick up any non-verbal clues that may be important

➢ Give the customer your full attention – consciously stop yourself from thinking about other things

➢ Use appropriate body language and questions to enhance your understanding of what the customer is saying.

Ask questions to check you understand what they want

We can tend to be quite poor at asking good quality questions. Many people tend to just ask questions which require a yes/no or one-word answer. These can be very useful for checking specific facts and details, but they don't really help you to truly understand what the customer's expectations are. This is particularly important when the customer wants something unique or specific, or where they have particular needs such as delivery to a specific timetable, etc.

Good questions to ask usually start with:

➢ Why?

➢ What?

➢ Where?

➢ When?

➢ How?

We call these 'open' questions as they potentially unlock a bit more information than straightforward yes/no questions would. Examples include:

➢ 'What are you hoping to achieve?'

➢ 'What should the end result look like?

➢ ''Why does this have to be delivered on X date?'

➢ 'How are you going to use this item?', etc.

Questions such as these give a little more information so that you can really begin to understand the customers' needs and expectations.

Ask for the customer's feedback to confirm that you both agree on what is required

When you have asked the questions that you need to establish the customer's requirements, it's very useful to check with the customer that you both have the same understanding. Imagine the confusion if the customer says that they want 100 widgets which are sold in packs of ten – do they want 100 packs or 100 individual widgets? The difference is important. Imagine the potential confusion when discussing something that is more unique and specific to the customer such as a kitchen, or landscaping or a hairstyle, etc. This checking can be done using the next step.

Summarise and paraphrase the customer's requirements

These two techniques are very simple and effective ways of checking that you understand what the customer has said.

Summarising means repeating back a shortened version of what the customer has said *using their words*. For example: 'OK, you're looking for a complete garden redesign, including the removal of three mature trees, replacing the lawn with hard surfaces and this has to be completed by 14th June for a family party.' By doing this, you are confirming in your own mind what you think the customer has asked for. More importantly, it gives the customer the opportunity to confirm or correct what you have said. In this example, the customer may say 'Yes, that's exactly right', or they may say 'Yes, that's mostly right but I also need for the fence to be painted'. This is a very simple way of ensuring that you and the customer agree on what is required.

Paraphrasing means repeating back what the customer has said *using your own words*. This is subtly different from summarising in that you are interpreting what the customer has said. Following the example above, the customer's needs may be paraphrased as: 'OK, you want to re-landscape your garden by early June, removing some trees and the lawn and giving it a contemporary look' Again this gives the customer an opportunity to confirm or correct what you have said with a view to you both having the same understanding. Again in this example, the customer may say' Yes, that's exactly right' or they may say 'Yes, that's what I'm looking for but can I just check what you mean by the word 'contemporary'?'. In either event, this is a great opportunity for the customer and the service provider to really check that they both understand and agree on what's being asked.

Use appropriate body language

'Body language' is the term we use to describe the non-verbal hints and clues that often give us away in terms of what we're thinking or feeling.

Body language usually consists of:

Facial expression: we can show interest or lack of interest; boredom; apathy; liking/disliking; agreement/disagreement and many other emotions just by our facial expression

Eye contact: this is often regarded as an essential component in effective communication as it indicates interest and attention between two people, but be aware that eye contact behaviour can vary from one cultural group to another

Posture: if we lean towards or away from someone, it can indicate interest or lack of interest

Nodding: this is a way of signalling that we are listening to the other person and does not always indicate agreement, but that the other person's words are being noted

Hand gestures: these can be used to emphasise key points, or visually describe something

Voice tone: our tone can reveal a great deal about what we are thinking, the way that we emphasise certain words can indicate their importance, etc.

Minimal encouragers: these include noises and words such as 'um'; 'hmmm'; 'I see'; 'yes', etc. These again let the other person know that you are listening to them.

Care should be taken when using and interpreting body language signals as there are significant differences between what is described as 'the norm' in different cultures and societies. In some cultures for example, too much eye contact can be interpreted as aggressive and threatening, whereas in others, frequent eye contact is a social norm.

Another important 'health warning' is to beware of reading too much into individual body language signals which are taken in isolation. A popular misconception is that if I have my arms folded, I'm being aggressive or defensive. However, I might just find it comfortable to fold my arms, I might be feeling cold, it may be my natural 'at rest' pose, etc.

The key is to look at all the body language signals as a package and to interpret what they are saying overall. If the person is frowning, has a raised voice tone and has their arms folded, then it may indicate that they are indeed unhappy. However, taking the 'frown' or 'arms folded' signal in isolation could lead to a misinterpretation of what they are actually feeling.

When working with customers, it is important to use positive and professional body language which usually consists of:

> ➢ Open, friendly facial expression, possibly smiling
>
> ➢ Appropriate level of eye contact
>
> ➢ Upright posture
>
> ➢ Open hand gestures
>
> ➢ Even, calm voice tone, etc.

Let's take a look at what all this might mean in a conversation between a service provider and a customer. Here are two conversations in the hairdressing and beauty salon. In which one does the hairdresser gain a deep understanding of what the customer wants?

<u>**Conversation 1**</u>

Hairdresser	Hi – how are you today? What can we do for you today?
Customer	Hi – I'm good, thank you. I think it's time for a change.
Hairdresser	OK! What do you have in mind?
Customer	I'm not really sure. I just want a new style which suits me.
Hairdresser	OK. I can do that for you. Let me suggest doing............
Customer	Sounds fine. Let's do that.
Hairdresser	Great!

Conversation 2

Hairdresser	Hi – how are you today? What can we do for you today?
Customer	Hi – I'm good, thank you. I think it's time for a change.
Hairdresser	OK! What do you have in mind?
Customer	I'm not really sure. I just want a new style which suits me.
Hairdresser	How long have you had your current style?
Customer	About five years.
Hairdresser	What do you like/dislike about your current style?
Customer	Well, I like the colour and I like the fact that it's easy for me to style at home. It's too long and bushy though.
Hairdresser	OK, so we can keep the colour the same and aim for something that's easy for you to manage at home. What sort of look are you aiming to achieve?
Customer	Well, I like Jennifer Celebrity's style at the moment.
Hairdresser	Ok, her hair is quite a lot shorter than yours so we could maybe take about 10cm off the length. How would you feel about that?
Customer	Hmmm. That's maybe a bit shorter than I was thinking.
Hairdresser	OK. That's no problem. We don't have to go as short as Jennifer. We could just take 5 or 6cm off. We can then put some layers through the top and side sections to make it less bushy. What do you think?
Customer	Sounds good.
Hairdresser	OK, so we're keeping the colour the same, taking 5 or 6cm off the length, and putting some layers in here, here and here. OK?
Customer	Great.

In conversation 2, there is much more information exchanged about what the customer is aiming to achieve, what she likes/disliked and her general expectations and requirements. The hairdresser has achieved that by asking a mixture of open and closed questions, and they have checked for the customer's agreement at key points. The customer in Conversation 2 is much more likely to be happy with the end result than the customer in Conversation 1, as the quality of the exchange between the customer and service provider was so much better.

Rapport

'Rapport' is like the oil which oils the wheels of a conversation. Without rapport, a conversation can feel very much like hard work. When we are 'in rapport' with someone, the conversation flows freely and if often feels effortless – consider the conversations that you have with your best friend compared with the type of conversation you may have with a stranger. The difference between the two is likely to have something to do with rapport.

Rapport can be built through the effective use of positive and professional body language and good quality questioning and listening. By having rapport with the customer, it is much easier for them to open up with any specific details regarding their expectations and any concerns that they may have. It is also easier to let the customer down gently if it is not possible to fully meet their expectations when there is a good rapport.

1.2 – Assess customer needs for urgency to determine priorities for service delivery according to organisational and legislative requirements

Timescales

The timescales for meeting customers' needs can vary from:

> ➤ Immediate

> ➤ Short term

> ➤ Medium/long term.

Customers' immediate needs may relate to obtaining information, buying a product or service or making a complaint. For example, a customer may ring an organisation asking for information about a particular product, its price and its availability. In these situations, there should be a fairly straightforward and swift response after checking the relevant details. If it's not possible to give an instant answer, then it should be possible to give an answer within a few minutes or hours.

In other situations, the customer may require the provision of the products or services in the short, medium or long term. The definitions of short, medium and long term will vary depending on the context of you organisation. In general, short term tends to mean 'in the next few weeks', whereas 'medium/long term' tends to mean 'in the next few months. However, this may vary and, in some organisations, a period of one year may be viewed as 'short term'. It is important to have an understanding of what different timescales are relevant in your own organisation.

It is also important to understand what the customer means if they give vague or imprecise timescales. If they say that they want the product or service 'soon' or 'as soon as possible', it is very difficult to determine exactly what they mean without further questioning. Again, in some contexts, 'soon' might mean 'today', but in other contexts, it might mean 'within the next four weeks', for example.

It's useful to check out any restrictions that the customer has in terms of delivery timescales. They may need to have your product or service in place/delivered by a certain date in order for another supplier's products and services to be delivered on time. A good example of this is when a customer is

undertaking a project in which there are a few different components being provided by different suppliers.

An everyday example might be the re-landscaped garden that was mentioned earlier. In order for the hard surface to be installed, the trees and the lawn have to be removed and the waste needs to be removed from the site. This means that the delivery of the hard surface material should not be made until the trees, lawn and any other debris/waste have been removed from the site. When dealing with the supplier who removes the waste from the site, there should be clear and agreed dates as to when this service is expected to be provided so that there are no unnecessary delays in completing the project.

Part of establishing the customer's needs is gaining a clear understanding of their timescales and priorities so that this can be taken into account when reaching agreement with them. Using clear and specific questions will help you to establish the degree of urgency associated with the customer's request. When you have this understanding, you can then proceed to agreeing what you will provide and when.

Other factors to consider when looking at timescales include:

> ➢ What other commitments and priorities do you have?

> ➢ Do any of your existing commitments conflict with this customer's request (i.e. will you be able to deliver to the timescales requested)?

> ➢ What organisational requirements should you take into account?

> ➢ What legislative requirements should you take into account?

It is important to take a realistic view of existing commitments that you have made to other customers. It is disappointing (and potentially damaging to the reputation of your organisation) to over-promise and under-deliver. That is, it is not desirable to make a commitment to a customer which you are unlikely to be able to keep due to the other commitments you have agreed to.

You should also consider the organisational and legislative requirements which may affect the customer's needs.

Organisational requirements may include:

> ➢ Access and equity principles and practice

> ➢ Anti-discrimination and related policy

> ➢ Defined resource parameters

> ➢ Goals, objectives, plans, systems and processes

> ➢ Legal and organisational policies, guidelines and requirements

> ➢ WHS policies, procedures and programs

- ➢ Payment and delivery options

- ➢ Pricing and discount policies

- ➢ Quality and continuous improvement processes and standards

- ➢ Quality assurance and/or procedures manuals

- ➢ Replacement and refund policy and procedures

- ➢ Who is responsible for products or services.

When considering timescales, you should take into account any policies, procedures or practices which affect any agreements that you are making with customers. For example, there may be a discretionary or statutory 'cooling off' period between a customer placing an order and the agreement becoming legally binding. If the customer wanted the product delivery before the expiry of the 'cooling off' period, this may compromise your organisational or legal requirements. Alternatively, a customer may wish to take advantage of a special pricing offer that is only available for a limited period of time and so this would have to be ta ken into account when planning service delivery with the customer.

1.3 – Use effective communication to inform customers about available choices for meeting their needs and assist in the selection of preferred options

Having identified the customer's needs and the degree of urgency associated with their request, it is important to communicate to them how you can help to meet their request, or otherwise. With a good understanding of what the customer is looking for, we are now in a position to offer them a range of possible solutions and help them to choose the best option for them.

Returning to our hairdressing and beauty salon, when the hairdresser and customer are discussing what the customer wants, it would be appropriate for the hairdresser to outline some options.

 These may include any of the following:

- ➢ Showing the customer photographs in a magazine or on-line of suggested hairstyles

- ➢ Showing the customer actual samples of different hair colours

- ➢ Explaining the advantages and disadvantages of different styles and options, etc.

This is the step at which you can set out precisely what your organisation can do to meet the customer's needs and the key facts associated with each option. For example, the customer may want to change their hair colour and so the hairdresser could set out the range of colouring services that they provide, the relative costs of each, and any associated advantages or disadvantages to help the customer to make a choice.

This might be done with the help of sales literature or other written or online information and so it would be important to have a good knowledge of the facts and information contained within that literature so as to guide the customer effectively.

In this conversation with customers, it is essential to communicate effectively.

Effective communication can be achieved through the following:

> ➢ Giving customers full attention
>
> ➢ Maintaining eye contact, except where eye contact may be culturally inappropriate
>
> ➢ Speaking clearly and concisely
>
> ➢ Using active listening techniques
>
> ➢ Using appropriate language and tone of voice
>
> ➢ Using clear written information/communication
>
> ➢ Using non-verbal communication e.g. Body language, personal presentation (for face-to-face interactions)
>
> ➢ Using open and/or closed questions.

Essentially, this step is concerned with telling the customer how you can help them and giving them adequate information to help them to make a decision about their purchase/order.

1.4 – Identify limitations in addressing customer needs and seek appropriate assistance from designated individuals

Limitations in addressing customer needs

If you are simply unable to meet a customer's needs, then it is important to say so, clearly and simply and without delay. A common scenario involves a service provider who visits a customer's home or business premises to provide a quote for a piece of work but never actually submits a quote. Meanwhile, the customer is unable to take any other action whilst they await the delivery of the quote. This can happen for a variety of reasons.

The service provider may not be:

> ➢ Competent to do the work
>
> ➢ Interested in doing the work
>
> ➢ Available to do the work within the customer's timescales
>
> ➢ Able to do the work within the customer's budget, or to the required level of quality, etc.

The consequences of this provider failing to deliver a quote can hinder the delivery of the overall project whilst the customer awaits information that is never forthcoming. It is much better, and more professional, for the service provider to simply state at the outset that they are unable to provide a quote for the work. This enables both parties to move on without any delay or hard feelings.

So, sometimes the answer may not be what the customer wants to hear, but it is in everyone's best interests to state this clearly and simply at the outset. A far better response from the service provider to the customer might be: 'Thank you for inviting me to quote for this piece of work. However, I am unable to meet the timescales you have asked for and so I won't be able to provide you with a quote on this occasion.' This lets the customer know where they stand so that they can then pursue queries with other service providers. However, turning a customer away is a last resort and efforts should be made to work within the limitations posed by your organisation or legislative requirements.

 Having agreed what the customer wants and determined their exact requirements, it is important to assess any limitations which may affect delivery of the products and/or services. Returning to the example of the hairdressing and beauty salon, it may be a legislative requirement to perform a skin test on a customer if a colouring treatment is to be used. The purpose of this is to identify any possible skin reactions to the chemicals in the hair colour treatments before committing to treatment which will affect the entire scalp. If the test is negative, then the colour treatment can progress as planned. However, if the customer has a positive result and they show a reaction to the chemicals, then this affects the suitability of this treatment option.

To respond to this limitation, the hairdresser may:

➢ Ask for another opinion from a colleague, supervisor or line manager

➢ Ask for advice from the colouring treatment supplier

➢ Offer to repeat the test after 24 hours to check its reliability

➢ Offer a different colouring treatment option which does not include chemicals

➢ Offer another technique which avoids the use of colour treatments, etc.

By doing this, the hairdresser can be sure that they have avoided a potentially harmful treatment option, met the legislative and organisational requirements and worked with the customer to find a mutually acceptable solution.

When you have identified any limitations in delivering the agreed service to the customer, you may be able to offer some possible solutions from your own experience. However, it may be necessary to refer these situations to others for advice and guidance.

This may include:

➢ Colleagues

➢ Customers

➢ Line management

➢ Supervisor.

Your colleagues and supervisors and managers may have personal experience of similar situations, or they may be able to offer guidance on the organisational and/or legal requirements affecting the service you are discussing with the customer.

However, other customers may also provide a source of assistance. This may not be appropriate in the hairdressing example, but in other contexts, it may be entirely appropriate to contact previous customers to ask for their input or guidance on similar situations.

For example, a previous customer who had their garden re-landscaped may be able to offer some very useful information about how they have found the durability and quality of the hard surface that they chose for their own project. This may be useful information when deciding what course of action to take in the light of any limitations affecting what your current customer is seeking.

2. Deliver a service to customers

2.1 – Provide prompt service to customers to meet identified needs in accordance with organisational and legislative requirements

Meeting customer needs

Customers generally expect that their needs will be met, and that this will be done in a timely fashion. At the hairdressing salon for example, a customer would not expect to be kept waiting for 30 minutes after their appointment time before they are seen by the hairdresser. In the landscaping example, if the customer is expecting the work to take place in the third week of June, then they will expect that to be the case unless they are given advance warning that poor weather conditions would hamper progress, etc.

The definition of 'prompt' will depend on the nature of the service being provided and the context of your organisation. Getting a garden landscaped within three months of making the initial enquiry may be the norm in the garden landscaping trade. In the hair and beauty industry, customers would not expect to wait three months for an appointment – in this context, they are more likely to expect the service to be delivered within days or weeks. In other circumstances (e.g. a bar or a cafe), customers would expect near immediate attention and would not expect to be kept waiting for long periods of time.

To understand what is meant by 'prompt' in your organisation, this may be set out in procedures or guidelines – if you are unsure, you should ask your supervisor or manager for a definition.

Customer service standards

It is not unusual for organisations to have customer service standards such as:

> ➢ Answer the telephone within three rings
>
> ➢ Reply to customer emails within 24 hours
>
> ➢ Send quotations to customers within one week of initial enquiry
>
> ➢ Offer the customer a drink within five minutes of arrival, etc.

These customer service standards are useful as they give the staff a clear indication of what timings are considered acceptable within their context.

Customers don't like to feel ignored or that they have been forgotten about. It is frustrating for a customer to arrive at an organisation's premises (e.g. a shop or a restaurant) and to be kept waiting until someone attends to them. It is equally frustrating for the customer to arrive at a till point where the assistant is talking to someone on the telephone and they have to wait until the assistant finishes their conversation before getting their attention. Also, customers dislike a feeling of having been forgotten about – when someone has promised to ring them back with an answer to their query for example, it's very disappointing when this doesn't happen and the customer has to pursue the organisation for the information they were looking for.

There are some key guidelines for delivering good quality service to customers:

 ➢ Always acknowledge the customer with a smile and a polite greeting

 ➢ If dealing with something else (e.g. a telephone call), make eye contact with the customer to let them know that you have acknowledged them – it would be even better if the person excused themselves from the phone call to say 'I'll be with you in a moment' (or similar)to the customer

 ➢ Avoid keeping customers waiting for long periods of time – if you are behind schedule which will result in a delay for the customer, let them know this. They can then make a decision about how to use the waiting time – it is very frustrating to be kept waiting without knowing why or how long you are likely to have to wait

 ➢ Explain to customers what you are doing – you may have to go away to get an item or to check information, etc. If this is the case, tell the customer what you are doing so that they know you are still helping them and haven't forgotten about them

 ➢ Use your interpersonal and effective communication skills to engage with the customer

 ➢ Make sure that what you provide is what the customer has asked for – this may require checking with them that the item/service provided is in line with what they were expecting

 ➢ Make sure that you follow your organisation's procedures and any legislative requirements – avoid breaching procedures - at best, this may compromise your organisation; at worst, it could result in harm being done (e.g. if safety precautions were not adequately explained to customers, etc.).

2.2 – Establish and maintain appropriate rapport with customers to ensure completion of quality service delivery

Rapport

Rapport can be defined as the oil which helps the wheels to turn smoothly. Without oil, the wheels will grate and grind, and will be difficult to move. It is exactly the same in an interaction between two people. Where there is little or no rapport, conversation is awkward, stilted and just generally difficult. Where there is rapport, the conversation seems to flow effortlessly and it is a much better and more enjoyable interaction. You don't have to be the best of friends with your customers, but a little rapport goes a long way to delivering good quality service and giving the customer an excellent customer experience.

Rapport can be built using the following tips:

> ➢ Smile
>
> ➢ Make appropriate eye contact
>
> ➢ Give the customer your undivided attention
>
> ➢ Look and sound interested in the customer
>
> ➢ Ask appropriate questions
>
> ➢ Make appropriate gestures (e.g. nodding)
>
> ➢ Mirror the customer's body language (but without mimicking them)
>
> ➢ Ask 'icebreaking' questions such as 'How are you today?', but without being obtrusive
>
> ➢ Show the customer that you are listening, etc.

It's fun to observe people in public places, just going about their business. How can you tell that two people walking down the street are 'together'? How can you tell when a conversation is not going well between two people? Rapport is likely to be a factor in either scenario. You can tell that people are 'together' as they will walk at the same pace, be leaning towards each other, may make frequent eye contact, will be obviously listening to each other, etc. You can equally tell when a conversation is not going well if the following occurs: people are turned away from each other, there is no eye contact, there are stern or frowning facial expressions, long silences or people talking over each other, etc.

Consciously building rapport is a very simple yet powerful way of delivering excellent customer service. Two customers can receive identical service: one where the assistant has built rapport and one where the assistant has no rapport and simply delivers the service with no 'personal touch'. Inevitably, the 'in rapport' example results in a customer who is delighted with the service compared to the 'out of rapport' example.

Think of your favourite bar, cafe or restaurant and what makes it your favourite compared with similar places elsewhere. Although things like location, decor, menu, price, etc. may have a part to play in your decision, it is also likely that the customer experience and rapport with staff is good.

It is unlikely that customers will keep returning to an organisation where the service is poor, unless they have resigned themselves to the fact that they will get poor service and so they lower their expectations and are prepared to put up with poor service in the light of excellent products or great prices, etc.

There is a European budget airline which is famously dismissive towards its customers. It could be said that they treat their customers with contempt for policies such as charging customers to use the toilet, for example. This doesn't sound like a sensible strategy, yet it is a hugely successful organisation because they provide a service which is cheaper than any of their competitors and customers are prepared to tolerate the poor service to take advantage of the cheap flights. It is unlikely that these customers are going to be too concerned with rapport from the staff, as their main motivation to use the service is usually based on price only, and they almost expect to be treated badly!

However, rapport is like an invisible magic ingredient which makes a good service experience a great one. It's simple to do and it costs nothing.

When there is rapport, it is much easier to deal with complaints and difficulties than where there is no rapport. Imagine having to disappoint the customer by telling them that their usual hair stylist is off work due to illness today, or that the landscaping cannot go ahead next week as essential supplies have not been delivered. These situations are much more comfortable and easier to manage when there is rapport with the customer.

2.3 – Sensitively and courteously handle customer complaints in accordance with organisational and legislative requirements

Handle customer complaints sensitively and courteously

We don't live in a perfect world, and even with the best people, systems and products in the universe, things can and will go wrong. Sometimes you will be able to see a problem coming and you'll be able to deal with it before it gets to the stage where the customer makes a complaint. Other problems will crop up which you know nothing about until the customer points it out when making a complaint.

Complaints are often regarded as something to be avoided at all costs. On the contrary, complaints offer a great opportunity for an organisation to understand a problem that has occurred. If problems are happening but there are no complaints, there is no way that the organisation will be able to identify the problems and stop them from happening.

A complaint is a golden opportunity to highlight something that has gone wrong and then take steps to resolve the problem for that customer, but also to ensure that the same problem doesn't keep happening in future.

For example, if incorrect products are being delivered to customers, there is the cost of returning the incorrect products to the warehouse and then sending out the correct product. This involves three deliveries (the original delivery; the return; the delivery of the replacement item) and their associated

costs; the cost of additional handling and processing time; possibly a goodwill gesture to the customer (e.g. partial refund or voucher for future goods/services, etc.). So, one incorrect product being delivered can actually amount to a significant loss to the organisation.

If this happens repeatedly, the problem escalates and can become very costly and wasteful. However, if the organisation analyses its returns, it may find that 80 per cent of the returned items were dispatched by the same employee, this may indicate a lack of training, or a lack of attention to detail, etc. Steps can then be taken to rectify the real problem (the employee making mistakes) rather than simply continuing to resolve all the individual returns on a case-by-case basis.

So, given that complaints can be a source of useful information for an organisation, what sorts of things do customers complain about?

They may include:

> ➢ Administrative errors such as incorrect invoices or prices

> ➢ Customer satisfaction with service quality

> ➢ Damaged goods or goods not delivered

> ➢ Delivery errors

> ➢ Product not delivered on time

> ➢ Service errors

> ➢ Warehouse or store room errors such as incorrect product delivered.

Whatever the nature or the cause of the complaint, customers will have some very basic expectations when they raise their complaint. They will expect to be taken seriously and that steps will be taken promptly to rectify the problem. They will also expect an apology and possibly some form of compensation or incentive for them to do business in future with your organisation.

When dealing with a complaint, use the following guidelines:

> ➢ Always acknowledge the complaint – thank the customer for bringing it to your attention

> ➢ Apologise, even if it's not personally your fault– the customer will expect to receive an apology on behalf of the organisation

> ➢ Ask questions to determine the exact nature of the complaint and its effects

> ➢ Ask the customer what would be a good solution for them - are they looking for a replacement? A refund? A discount? A formal apology, etc.?

> ➢ Tell the customer what you are able to do to resolve the complaint – you must ensure that you act within your organisational and

legislative requirements so you should not promise anything that is outside these parameters (e.g. if your organisation's procedures allow you to offer an immediate replacement only, don't offer discount on future purchases as well)

➢ Agree the next steps with the customer and check that they are satisfied with what you are proposing

➢ Deliver the solution that you have promised – this may involve keeping the customer informed of your progress (e.g. calling the customer to let them know when they can expect redelivery of their item, etc.).

Complaints should be handled with sensitivity. Although complaining can seem like a way of life for some people (the 'professional complainers'!), it may take a great deal of nerve and effort for others. When a product or service is not as expected, the customer has a right to say something about that and to expect for the matter to be resolved to their satisfaction. Customers should never be given the impression that they are wrong to complain.

Take a look at the following example:

> A customer bought an automated cat-feeding bowl prior to going away for a few days' holiday. It was a battery-operated device where the lid on the feeding bowl popped open at times set by a timer mechanism. A few days and one hungry cat later, the customer realised that the feeding bowl had not operated correctly despite having tested it prior to use.
>
> The customer returned the item to the pet store where she bought it, along with the receipt proving the purchase had been made at that store. The pet shop owner initially refused to refund or replace the item claiming that the customer hadn't operated the device correctly (and implied that she had broken it). The customer demonstrated how she had operated the unit, and was embarrassed having to do this in front of other customers in the busy store. However, this did prove that the item was in fact faulty.
>
> The shop owner was most insistent that it would be an inconvenience for her to return the faulty product to her supplier and that is was not her usual policy to give refunds. The customer quoted her legal entitlement to a refund or replacement for faulty goods and threatened legal action against the shop. Eventually, the shop keeper agreed to give a full refund, but gave no apology and left the customer with the impression that she had been the one at fault, when this was not the case. The customer never returned to that particular store again and actively warned other people against shopping there.
>
> The shop keeper's poor handling of this complaint was damaging to the business in the loss of an existing customer and the potential loss of other customers as well.

In this example, the shop keeper handled the complaint badly by being obstructive, failing to take responsibility for the problem and potentially breaching legislative requirements by initially refusing to refund or replace the faulty item. It is essential to follow the correct legislative guidelines and rules when dealing with complaints to avoid future action which could prove costly and damaging to the business.

Sensitive and courteous complaints handling involves:

> ➢ Giving the customer sufficient time to explain what the problem is
>
> ➢ Avoiding interrupting the customer while they are speaking
>
> ➢ Allowing the customer to vent their frustration or anger – let them get it out of their system first
>
> ➢ Apologising early on in the conversation – you can say something like 'I'm sorry that you've had this problem' – you are not actually taking responsibility for causing the problem by saying this, but it is reassuring for the customer to have received an apology
>
> ➢ Really listening closely to the customer and showing empathy with their situation
>
> ➢ Encouraging them to continue if necessary
>
> ➢ Asking factual questions to check the facts of the problem
>
> ➢ Agreeing that the customer was right to raise the complaint in the first place
>
> ➢ Thanking them for raising the matter and apologising before closing the conversation.

A complaint that is handled well can actually create 'fans' of the organisation. If a customer feels that their complaint has been taken seriously and resolved to their satisfaction, they are more likely to remain a customer and may even become a loyal advocate of your business. Handled badly, a complaining customer may well become an ex-customer who will never do business with you again, and will delight in telling lots of people about their poor experience.

On average, a satisfied customer tells three or four people about their positive experience; a dissatisfied customer typically tells 12 others. In an age where social media is used extensively to publicise customers' opinions, it's actually very easy for a dissatisfied customer to tell *thousands* of people about their negative experience. So, it makes good business sense to make sure that complaints are handled effectively.

2.4 – Provide assistance or respond to customers with specific needs according to organisational and legislative requirements

Respond to customers with specific needs

Customers are not all alike, and whereas you may have a 'typical' customer who buys your products or services, there will undoubtedly be those customers who have specific, individual needs which have to be met.

For example, the hair and beauty salon may typically cater for young women in the age range of 18 - 30, and the products, services and the salon environment would be tailored to attract that segment of the market. However, an 80 year-old customer who wants to use that salon because it is just around the corner from where she lives would perhaps require some additional assistance – she may not be able to sit comfortably in a reclining chair and would need to be offered an alternative; she may not be comfortable with the type of music being played and so a selection which has wider appeal may be used during her visit; she may need to use the toilet facilities during her visit, etc.

The important thing in this example would be for the salon staff to recognise that this customer may need additional assistance or special arrangements to be made to enable her to access the salon's services comfortably and with dignity.

This can easily be achieved simply by asking the customer if she is comfortable, asking what she needs and checking with her the suitability of the alternatives that are being offered.

By doing this, the salon would be making some fairly minor adjustments to their usual service offering, but this would make a significant difference to the customer in terms of her comfort and ability to access the services available. And if the customer is comfortable and receiving a good service, she is very likely to return to that salon in future.

Customers may have a range of specific needs which need to be met. These include:

> ➤ Age
>
> ➤ Beliefs/values
>
> ➤ Culture

- ➢ Disability

- ➢ Gender

- ➢ Language

- ➢ Religious/spiritual observances.

It is important to establish any particular needs that the customer may have, for a number of reasons:

> ➢ All customers should equally be entitled to access your organisation's products and services, irrespective of their individual needs

> ➢ It makes good business sense to ensure that your organisation can meet the needs of individual customers – a satisfied customer will advertise this fact and possibly generate more business as a result

> ➢ Denying a customer access to your products/services may be in breach of legislation

> ➢ Some customers may be able to attract a grant or subsidy for your products/services on account of their status (e.g. disability)

> ➢ A customer's needs may affect the priority given to them (e.g. a cancer patient may receive priority treatment over a healthy individual), etc.

> ➢

2.5 – Identify and use available opportunities to promote and enhance services and products to customers

Promote and enhance services and products to customers

In delivering a service to a customer, the organisation can find out a significant amount of information about the customer and their needs. In chatting to the customer in the hair and beauty salon for example, the stylist may identify that the customer is preparing for a wedding and so they may suggest that a manicure or other beauty services may be appropriate. Working within their organisational guidelines, they may be able to offer a discount on additional services, or vouchers for use at a later date, for example. In the garden landscaping example, the gardener may establish that the customer is a keen bird watcher and may suggest some features or products for attracting wild birds to the garden.

In addition to the opportunity to generate additional sales, interacting with customers affords other opportunities to promote and enhance products and services, which may include:

> ➢ **Extending time lines** – customers may be allowed additional time to confirm their order or complete their payment, for example

> ➢ **Packaging procedures** – variations may be made to packaging procedures to accommodate the customer's needs (e.g. Removing packaging prior to delivery of an item, or removing the packaging after unpacking, etc.)

- ➢ **Procedures for delivery of goods** – ensuring that delivery can take place at a time that is convenient for the customer, and ensuring that any special delivery instructions are noted and confirmed

- ➢ **Returns policy** – it is important for the customer to understand the returns policy in terms of the item condition, timescales within which a return can be made, refund arrangements, etc.

- ➢ **System for recording complaints** – customers need to know how and to whom they can make a complain if necessary. This is sometimes included within the paperwork accompanying a sale, or may be communicated to the customer in a follow-up letter or email to the customer at the point of delivery

- ➢ **Updating customer service charter** – when an organisation updates its customer service charter, there is an opportunity to review the way in which products and services are promoted and enhanced and identify ways of improving this.

Good customer service is not just about the delivery of what the customer asked for – a great customer experience is one in which the customer receives service whiich is beyond what they expected. Having timescales extended, or being given help with removing packaging for example are simple and effective ways of delighting a customer so that they are fully satisfied with the service, are likely to return in future and are likely to recommend your organisaton to others.

Your organisaiton's procedures may already be set up to automatically advise customers of the complaints or returns policies for example. However, if this is not the case, you should talk to your superisor or line manager about this final step in delivering a good service to your customers.

3. Monitor and report on service delivery

3.1 – Regularly review customer satisfaction with service delivery using verifiable evidence according to organisational and legislative requirements

3.4 – Regularly seek customer feedback and use to improve the provision of products and services

Documenting and monitoring service delivery

Identifying customers' needs and delivering the service that they require is what good customer service is all about, isn't it? On the face of it, this is indeed the case. However, an organisation that is serious about delivering good service *consistently*, and getting better at it, goes one step further – they monitor service delivery and identify areas for improvement.

Your customers may be receiving excellent customer service, but if this is not captured or recorded, there is a missed opportunity for:

> ➢ Recognising your customer service strengths

> ➢ Identifying areas for development or improvement

> ➢ Identifying trends which may inform future product/service delivery plans

> ➢ Informing the overall business planning process by hearing the customer 'voice', etc.

Customer feedback is essential for understanding the customer experience: what is working well and what is not working well. It is also a basic component of any customer service offering – the organisation provides a product/service to its customers, so of course it should be interested in whether or not the products/services are what the customer expects and requires.

The first step in monitoring service delivery is to obtain feedback about the customer experience using verifiable evidence. 'Verifiable evidence' is data which can be checked and is not based on intuition, gut feel or hearsay.

This data can be obtained from many different sources including:

Customer satisfaction questionnaires: face-to-face, telephone, on-line and paper-based questionnaires and surveys can be used to generate customer feedback. Sometimes incentives are offered (e.g. entry to a prize draw) to motivate customers to engage in the survey process. The results of this feedback can then be analysed and trends and patterns can be identified. Surveys may take place on a rolling basis (e.g. customers are invited to participate every time the service is delivered) or at pre-arranged times of the year. It is important to have processes in place to review the incoming data from questionnaires and surveys. The worst thing that can happen is that the data is collected but no-one ever looks at it as this is a tremendous loss of an opportunity, although sadly this does happen in some organisations.

Audit documentation and reports: routine audits may involve an element of seeking customer feedback and opinion via questionnaire/survey methods, or via a review of existing customer feedback mechanisms. Audit processes can highlight particular instances of customer satisfaction/dissatisfaction and then steps can be taken to investigate the reasons for this and plan how to rectify this in future.

Quality assurance data: this may be linked to audit documentation and reports, but this essentially is data which answers the question: 'How do we know that our products/services are of the required quality?'. This data may include inspection or quality control data; faults or rejects logs, etc. An analysis of this data gives a comprehensive picture of the quality of products/services that the customer should be experiencing.

Returned goods: sometimes, customers return goods because they have made a mistake (e.g. used the wrong measurements) or they have simply changed their mind. If this is the case, it is useful to know the reasons for the returns so that you can check the customer's measurements for example, or check that they are sure about the buying decision they are making. Other times, the returns may be due to technical faults or damage, or because the product/service was not accurately described (in other words, what the customer thought they were buying is not the same as what they actually bought). An analysis of returned goods should give a good indication of any trends or patterns. For example, is there a high number of faults for a particular product? Is the product description unclear or inaccurate on a product/service?, etc. This analysis will help to identify flaws in the product/service or areas for improvement in the way that they are being sold or used.

Lapsed customers: a 'lapsed customer' is someone who was once a customer but is no longer.

This can be due to a variety of reasons:

➢ They may no longer need your product/service

➢ They were dissatisfied with your product/service

➢ They have found that your product/service is better/cheaper/more convenient elsewhere

➢ The customer has moved away/died, etc.

Lapsed customers who simply stopped using your products/services because they were dissatisfied for some reason are a useful source of information. Why did they stop using your product/service? What would make them want to use your product/service again in future, etc,? Finding out the reasons for the 'lapses' may offer invaluable information about the customer's experience.

Service calls: depending on the nature of the product/service you offer, you may make routine 'service calls' to carry out an actual service of the product (e.g. a central heating system) or as a routine check that the customer is happy with the product/service in the long term. This may take place a period of time after the original purchase or installation of the product/service, and it is a way of the organisation gathering information about the longer term performance of their product/service so that they can establish the customer's satisfaction and identify any problems that may need to be rectified. It may also be a requirement of the customer's purchase that there is a follow-up service call after a period of time to ensure the correct use of the product/service on safety grounds, etc.

Complaints: complaints offer a useful insight to the customer's experience, both from the point of view of the quality of the actual product/service purchased, and also in terms of the way in which the service was provided. Customers may complain via the traditional means of a letter, email or phone call, but increasingly customers are using social media to express their dissatisfaction with products and services.

Product reviews are widely available on the internet, and dissatisfied customers will not hesitate to record their feelings about a product/service in a very public forum. Organisations which campaign for customer rights frequently comment on the effectiveness of social media when making complaints as customers will often receive a swift and satisfactory response using social media as opposed to the more traditional methods of complaining. Complaints are, in fact, a gift for the organisation. If the customer is unhappy and does nothing about it, the organisation does not have the opportunity to put things right. However, when a customer complains, the organisation can begin to understand why they are unhappy and take steps, if appropriate, to rectify the situation.

Customer satisfaction review

A customer satisfaction review may be something that takes place on an ongoing basis or it may happen at planned times.

Many organisations operate a combination of both approaches where they:

> ➢ Review all incoming customer feedback from surveys, complaints, on-line forum postings, etc. on a day-to day basis, taking action to respond where appropriate

> ➢ Conduct monthly, quarterly or annual reviews of a range of data (e.g. audits; feedback reviews; service call data, etc.)

The day-to-day reviews inform the monthly, quarterly or annual reviews as this detailed data is often summarised to show trends and developments. Customer feedback may indicate a potential problem with the quality and reliability of Product X. A review of the audit data and returns information may also show that there have been production problems with Product X and this overall review has highlighted the need to take action in connection with Product X.

This may include one or a combination of the following possible solutions:

> ➢ Redesigning Product X

> ➢ Sourcing Product X from a different supplier

> ➢ Improving the quality of information for Product X

> ➢ Removing Product X from the product range, etc.

As you can see, a comprehensive review of customer opinion along with other verifiable data can lead

3.2 – Identify opportunities to enhance the quality of service and products, and pursue within organisational and legislative requirements

Reviewing customer satisfaction

A regular review of customer satisfaction will highlight areas where service delivery is good and where it needs to improve.

Returning to the hair and beauty salon, a quarterly customer satisfaction review might yield the following results:

> ➢ Eighty-seven per cent of customers rate their experience as 'satisfactory' or better in surveys

> ➢ Ten per cent of customers were critical about the range of refreshments available at the salon

> ➢ Seven and a half per cent of customers criticised the decor at the salon

> ➢ Two formal complaints were made about the hair colouring services

> ➢ One complaint was made about pricing

> ➢ Three complaints were made about the choice of music played in the salon

> ➢ An internal audit identified that one of the colourists has not completed their formal training and was colouring hair without adequate supervision.

From this brief summary of the customer satisfaction data, it is clear that the majority of customers are satisfied with the service provided by the salon but that there is some room for improvement. It is important to take a measured and calm approach to reacting to customer feedback.

On the one hand, there may be a temptation to take a relaxed view of this feedback with the vast majority of customers saying that they are happy, but on the other hand the salon owner might be tempted to redecorate the salon, change the music and revise the pricing strategy – this may not be in the best interests of the business as a whole. A higher priority would be the training of the colourist as there are potential safety implications involved.

There may be a connection between the inadequately trained colourist and the two formal complaints about hair colouring services – this could only be determined by a detailed review of the data.

However, in priority order, it would seem that the salon owner should look at the colourist's training before considering any other action.

Using reviews

The information obtained from a customer satisfaction review should be analysed objectively to reflect on what the data is saying.

Some useful questions to ask include:

➢ What strengths are highlighted by this review?

➢ How do we maintain and build on these strengths?

➢ Are there any obvious weaknesses or areas for development?

➢ Is there any contradictory data? If so, what other data do we need to look at to form a complete and accurate picture?

➢ What are our priorities for action?

➢ What action can we take to deal with any weaknesses? When? How?, etc.

The result of an analysis of customer satisfaction data should be an overview or summary of what's good and what could be improved – this identifies opportunities to enhance the quality of products and services in a calm, measured and well-evidenced way.

Too often, decisions are made to change products or services in response to a 'knee-jerk reaction' – this might be adverse feedback; criticism in the press; a high-profile complaint; etc. Of course, if your feedback shows that the way a product or service is being delivered is unsafe, unethical or breaches legislative requirements, then an immediate response would be necessary.

However, where the feedback is not so serious or far-reaching, then it is wise to reflect and consider the full picture before acting.

A useful step to enabling this reflection to happen is to produce an overview of possible opportunities for enhancing the existing product or service offering. This may be in the form of a summary report which gives the main findings (as in the hair and beauty salon example above) along with some key recommendations for action.

Once these opportunities have been identified, it is important for them to be pursued through the proper channels within the organisation.

The 'proper channels' will vary from organisation to organisation but may include one or more of the following:

> ➢ Formal or informal report to designated personnel (e.g. Customer Services Manager; Senior Management Team; etc.)

> ➢ Formal presentation of findings and recommendations to designated personnel

> ➢ Completion of formal 'customer service review' procedure (or similar)

> ➢ Feedback to individuals on the basis of the findings, etc.

Your involvement in improving service delivery may stop at this 'reporting' stage, or it may involve more work in the planning and implementation of actions to address the issues raised. It is important to be clear about your own role in this process and so if you are unsure about where your responsibilities start and finish, you should consult with you r supervisor or line manager.

3.3 – Monitor procedural aspects of service delivery for effectiveness and suitability to customer requirements

Monitoring procedural aspects of service delivery

It is important to monitor the procedural aspects of service delivery for a number of reasons:

> ➢ To ensure customer equality and satisfaction

> ➢ To identify problems and rectify them during the service delivery and before they adversely affect the customer

> ➢ To reduce the costs of replacements; rework; refunds; etc.

> ➢ To limit customer complaints

> ➢ To ensure that correct procedures are being followed

> ➢ To satisfy legislative requirements

> ➢ To satisfy external parties' requirements (e.g. equipment manufacturers; installers; etc.)

> ➢ To ensure quality and cost-effectiveness of service delivery, etc.

The way in which the service delivery is monitored will vary depending on the nature of the service being delivered.

At the hair and beauty salon for example, the service may be monitored using the following key points as a checklist:

> 1. Customer greeted within 30 seconds of arrival at Reception

2. Customer checked in on appointments system

3. Customer asked to wait in waiting area, if appropriate

4. Customer offered refreshments by receptionist

5. Customer introduced to stylist

6. Customer's need assessed by stylist

7. Plan verbally agreed with customer, etc.

This is an extract from an example of a customer service delivery procedure – it sets out what should happen, in what order, when and by whom. Someone monitoring service delivery can observe and check that each step is carried out according to the procedure, and identify any instances where this is not the case.

The procedure sets out the typical steps involved in delivering the service to the customers. By monitoring against this checklist, the reviewer can see what steps are being implemented correctly and any that are missed or otherwise.

There may be some very good reasons for a step not being met or being missed altogether and so the reviewer would need to exercise their judgement as to what should be noted or acted upon.

For example, the customer may not have been greeted until they had been in Reception for three minutes, but this could be due to the fact that they were having a conversation on their mobile phone as they arrived and didn't give the receptionist their attention until they had finished their call.

In that case, the fact that this step was missed can be ignored. However, if the customer was kept waiting for three minutes while the receptionist was looking up some information on the appointments system, then this would be a breach of procedure and appropriate action may need to be taken to prevent a recurrence of this.

In another context, the monitoring might consist of checking that a number of key steps have been satisfactorily completed in order to assess the quality of the service delivery. Taking the example of the landscaped garden, it would be important to monitor that different phases of the landscaping work took place in the correct order, using the materials specified and agreed with the customer, and dealing with any unexpected problems appropriately.

By carrying out this type of procedural monitoring, you are able to check:

➢ Are products/services being delivered according to the correct procedures, consistently and effectively?

➢ Are customers' requirements being met consistently and effectively?

If you are able to answer these questions using some factual data, you are in a good position to assess the effectiveness and suitability of the service delivery to your customers.

The data you could use to answer these questions might include:

➢ Your own (or others') formal observations of procedural compliance

➢ Your own (or others') review of paperwork/systems.

In the hair and beauty salon, the reviewer could observe the service delivery against a checklist and note the aspects which delivered correctly and any that were incorrect or missing. It would also be possible to review the appointments system to check that the customer had been correctly booked in, that the correct pricing had been applied, etc.

In this way, paperwork and other systems can be used to monitor that the service has been delivered correctly. Any deviations or variances can be investigated accordingly – again in the hair and beauty salon example, a non-compliance in terms of greeting the customer within a specified timescale could be due to the customer's behaviour rather than the fault of the receptionist and this fact should be taken into account when assessing the effectiveness of the service delivery.

3.5 – Ensure reports are clear, detailed and contain recommendations focused on critical aspects of service delivery

Reports

The outcome from the review and monitoring of service delivery is usually a report which outlines the key findings along with any recommendations for the future. The report may be formal or informal, presented in writing as well as verbally (in the form of a presentation), etc. The style and format of the report will very much depend on the organisation, its culture and any reporting procedures. However, there are some features which are likely to be common across many reports such as these.

Service delivery reports would typically include information about:

➢ The aspects of service delivery under consideration (e.g. which products/services; which areas of the business; which territories; etc.)

➢ The timeframe involved (i.e. the dates to which the report refers)

➢ Customer Satisfaction data (e.g. summary results of questionnaires/surveys; complaints; service call; audit/quality assurance data; etc.)

➢ Key findings (a summary of the main points arising from the data – trends and patterns, etc.)

➢ Recommendations (suggestions for action to be taken to build on the strengths and tackle the areas for improvement, in priority order).

It would also be good practice to include appendices in the report which gives the 'raw' data – that is, the actual detailed reports of questionnaire data, etc. Many readers may not actually access that detailed data, instead relying on your summary of it. However, the detail is there should readers wish to interrogate it, and it lends authority, transparency and credibility to your report as important data is not being kept from the readers.

Recommendations can simply be in the form of a list of issues to be tackled in priority order, or it may be a comprehensive overview of action that could be taken, how this could be achieved, the associated cost implications, etc. Again, this would depend on the protocols within the organisation.

The important thing to remember about this report is that is should accurately summarise the findings from the review of service delivery and it should make some valid recommendations for action, whether this action is aimed at stabilising and maintaining existing service levels or improving them.

It is important to remember that important decisions and the allocation of resources may be made as a result of such a report and so its accuracy and validity are essential. Decisions may be made about withdrawing or redesigning products/services; allocating time, people and money to actions to improve service delivery; etc. and so it is important that these decisions are made on the basis of accurate and reliable information.

If you are unsure about the reporting protocols within your own organisation, you should seek advice from your supervisor or manager, or a suitable person with designated responsibility for customer service delivery.
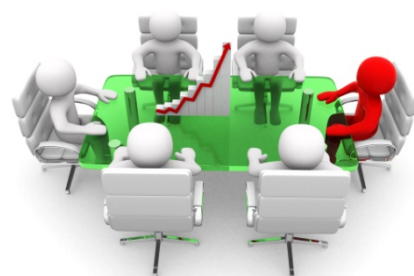
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