

Information Sheet: Customer Care Guidelines

Introduction

It is important to consider a Customer Care Policy as part of the marketing and promotion of an organisation. The way that organisations care for their customers affects their image and reputation and this reputation communicated through word of mouth between customers.

This Information Sheet suggests broad area of information that usually would be covered by a Customer Care Policy, though emphasis and detail will vary depending on the nature of the organisation. Customer Care refers to the customer's experience of the organisation: the treatment by people, the standards of quality, time keeping, etc., and the image/amenities. The term "customer" could be changed to user, client or whatever is most consistent with the objectives of the organisation ("customer" is used in this Information Sheet as a generic term).

Policy development

The policy should flow logically from other statements concerning the culture and values of the organisation, whether they are set out in the aims and objectives or elsewhere:

- As with other policies, involvement of those who will be implementing and applying the policy is essential to secure their commitment, and to help ensure that it is relevant, understandable and achievable;
- It is important to clarify who all the customers are: every organisation has a range and these include internal as well as external customers;
- The process of developing the policy should ensure that other policy requirements, such as equalities have been incorporated;
- If you are already trading, it might be useful to assess what "customers" think about your service and/or products at present using some of the techniques listed under "Obtaining Feedback" below.

Statement of principle

- A clear statement of the organisation's "customer care" intentions is useful – it may be the same statement as set out in a "mission" statement or other declarations of values and priorities, or refer to other aims/policies.
- This statement should be "quotable" (i.e. short and clear) so that it can be used in other contexts or printed separately for circulation. An example of this kind of statement might be: "Our customers' satisfaction is our most important priority" or "Our aim is to treat every customer as a special individual".

Standards of performance - Qualitative

Standards of customer care will need to be set out, and these will be both qualitative (not countable) and quantitative (countable). A starting point is to assess what standards of behaviour should apply in all points of contact with "the customer", such as when they enter the premises or over the telephone.

- If some concept of "satisfaction" features in the Statement of Principle, it may be necessary to do some research with existing or potential "customers" to know what it is that "will satisfy". Some organisations seek to achieve "excellence" – if that term is used it needs to be defined.
- The policy should ensure that all those involved with the enterprise see "customer care" as relevant to their behaviour, even if they don't have direct contact with "customers". There is likely to be an expectation that a community enterprise would embody a culture and value system that would promote high qualitative standards. Therefore the policy will need to highlight and define standards that apply to all, such as:
 - Adopting Equalities Policies
 - Appropriate attitudes (for example, caring, understanding, welcoming, taking responsibility)
 - Achieving high quality
 - Not "passing the buck"
 - Co-operation and support (teamwork)
 - Consideration and appreciation (as appropriate, e.g. patient)
 - Cleanliness/orderliness
- Many of these standards will be qualitative and depend on positive attitudes and high motivation. The general working atmosphere therefore needs to be addressed in the policy in order to achieve high standards.

- Workers who support good customer care will have a sense of pride in the enterprise and generally low stress levels.
- Developing pride – ensure workers understand their role and their importance to the customer’s satisfaction. Training through role-playing and techniques can help develop positive attitudes, and recruitment criteria and induction could include this issue.
 - Ensuring welfare of all workers (including volunteers) – will help engender a positive approach to their role. It is important to avoid a stressful environment and to support workers in achieving their potential and feeling confident in their role. Again, training (see overleaf) should be considered.
 - Rewarding “excellence” with some form of appreciation will encourage high standards, whether just “thank you” or through bonuses and/or promotion opportunities. In either case performance will need to be measured (for example, repeat business, on-time deliveries) but the criteria need to be linked to the overall measures of customer satisfaction.

Standards of Performance – Quantitative

Measurable standards are easier to meet and monitor, but are rather limited. Some examples are:

- Physical environment: What is the first impression of premises/vehicles, provision of signs, toilets, seating, and amenities.
- In-person: Appropriate behaviour (define as appropriate – e.g. smiles, handshakes, positive non-verbal messages), appropriate appearance.
- Over the telephone: Answering the telephone quickly; keep records, including customer’s name (provide forms if helpful)
- In writing: Answering all letters reasonably quickly; standardise image of the enterprise (letterhead, spelling, presentation, font, tone).
- Service/Product Delivery: Meeting agreed timescales; achieving promised quality.

How standards will be met

- Setting example by key people in the organisation;
- Establishing targets (these must be achievable – otherwise it is de-motivating for those trying to meet these targets), for example: to answer telephone within three rings; to maintain an accessible and safe environment; to ensure high quality of product or service;

- Procedures: that help ensure targets and standards are met, for example keeping records or filling in forms, covering telephone duty over lunch break etc.
- Training: identify areas where training will be made available and why. Useful subjects include:
 - Skills development – such as communication techniques on telephone, writing styles; or methods to improve or ensure quality of product or service
 - Customer “empathy” – understanding what will make the customer feel “special” (such as using their name, giving attention, using “open” questions and positive non-verbal communication)
 - Assertiveness training – learning to give a view without becoming aggressive or submissive. Also learning how to respond to aggression.

Handling complaints

- The objective of this part of the policy is to minimise the number of complaints, and in the event of complaints to handle these so that the customer remains a customer. The policy might incorporate guidelines aimed at avoiding complaints, for example by letting customers know of delays in advance.
- Inevitably there may be some complaints, and the policy needs to identify ways to encourage complaints where justified (to avoid the complainant telling others what bad service they have received); then ensure the complaint is dealt with in a manner that leaves the customer feeling positive about the organisation.
- Outline the specific procedures that should be followed in handling complaints, which might include:
 - Identify particular people to handle complaints, to ensure consistency, experience etc.
 - Take notes and ask questions to clarify details
 - Show sympathy not defensiveness
 - Provide alternative solutions
 - Get agreement and reconcile
 - Follow up to ensure that any agreed actions have been carried out.

Obtaining feedback

- The policy should include what steps will be taken to regularly monitor whether standards are being met, targets achieved, and procedures followed.

- Once the policy is in place it should be distributed widely to all those involved, included in recruitment and training, and reviewed on a regular basis to pick up on the results of monitoring or any new issues.
- The most important measure is “customer satisfaction” and customers will need to be asked how they rate service and if they are satisfied. Many organisations use questionnaires or monitoring cards – though the response rate is often low and views received may be helpful.
- Other methods include interviews or face-to-face surveys, follow up telephone calls, and “comments books” or “suggestion boxes” – different approaches will suit different enterprises.
- Keep track of and analyse complaints and the way they have been dealt with.