

BUSINESS EXCELLENCE SOLUTIONS



Customer Service Management Standard

eCSB Standard CSMS2003

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2003



Customer Service Management Standard™

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Development and Updating of CSMS™: 2003

The objective of the eCommerce Standards Board™ is to accelerate growth of customer trust in electronic commerce. This objective is pursued through active facilitation of the development, approval and continuous enhancement of standards, guidelines and best practice for Customer Service, eCommerce, Privacy and Security for the benefit of industry, commerce, and customers. The members of the eCommerce Standards Board™ all have strong international reputations as globally recognized quality professionals. Their curriculum vitae may be examined on the Web Site of the eCommerce Standards Board™: www.ecsb.net.

The initiative to develop this Standard was pioneered and supported by the eCommerce Standards Board™ as a consortium standard, rather than as a consensus standard developed by a standards writing body. A consortium standard is developed by a interested parties who are willing to collaborate in preparation of a standard. Examples of other consortium standards will include Telecommunications, Aircraft, Automotive and other industry-specific standards that supplement the basic quality management systems. This Standard was prepared by the eCommerce Standards Board™ Technical Committee – eCSBTC1. The development and drafting of the Standard involved representatives and submissions from service organizations, call center services, hotel and entertainment services, management consulting, certification bodies, utilities, insurance, information technology services, academia, information security, and personnel recruitment services. The 2002 version of the Standard is superseded by the 2003 version approved by the eCommerce Standards Board™ at its meeting in May 2003 in Kansas City, Missouri.

The Standard shall be subject to continuous review and enhancement by the Technical Committee. The Standard shall be updated at least once a year incorporating submissions for improvements and shall be published annually to reflect changes in customer expectations and requirements and changes in technology affecting the delivery of services to customers. The Technical Committee welcomes suggestions for enhancement of the standard and its support documents to assure that it reflects the continuously developing best practice in the customer service industry. All recommendations for improvement may be submitted to the Committee for investigation and consideration via email at: tc1@ecsb.net.

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Customer Service Management Standard™

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Customer Service Management Standard™

FOREWORD

The Standard was formulated by the eCommerce Standards Board™'s Technical Committee eSBTC1. It provides a generic roadmap and framework for establishing, implementing and maintaining systems for the management of customer service. The Standard was compiled as an industry sector standard and it should be read and adopted in conjunction with other relevant standards for customer service and quality management.

The Standard is applicable to any organization or enterprise that provides products and/or services to customers. Substantial benefits may be derived from the adoption of the Standard, especially by organizations that wish to pursue the achievement of best practice and delivery of exceptional service to customers.

The terminology used in the Standard has been carefully chosen to enable a wider generic application and high general acceptance.

The Standard contains a number of requirements also specified in other standards and it is intended that the implementation responses to these requirements should be interchangeable, whenever applicable. In accordance with the eCS Board rules and in order to respond to rapid changes in customer service expectations, the Standard is subject to continuous development and annual updates by the eCS Board Technical Committee eSBTC1.

Disclaimers

The user of the Standard acknowledges and accepts full responsibility for the completeness of material and its intended use and outcomes when adopting and implementing the Standard to its commercial, financial and other applicable operational circumstances.

Suggestions for improvement and submissions supporting the ongoing development and enhancement of this Standard can be made to the Chairman of the Technical Committee eSBTC1 tc1@ecsb.net.

Attention is drawn to the user of the Standard of the possibility that specific building blocks and elements of the Standard may be the subject of registered trademarks and patent rights and the eCS Board shall not be held responsible for identification of any or all such rights.

1. Introduction

The Customer Service Management Standard - CSMS™: 2003 addresses critical areas of customer concern, where other standards may not provide sufficient scope of application and customer protection.

Increased uncertainties caused by the use of technology and possible adverse consequences arising from inadequate customer service delivery systems are of major concern to customers around the world. This new age is facilitated by information technology that makes most business transactions and records transparent and available for abuse by third parties to the transaction. The advent of e-marketing and automated customer relationship management systems that gather and store customer information leaves customers vulnerable to inadvertent disclosure of their valuable data and raises questions regarding privacy, security, as well as ethical issues related to the relationship between service provider and customer. In addition, poor performance in this area can lead to lack of competitiveness of the service provider.

1.1. Emerging Customer Concerns

The principal concerns from the perspective of customers include:

- a) Concerns about quality, accessibility and integrity of suppliers when defective products or services are delivered,
- b) Concerns about customer service value entitlement,
- c) Concerns about fulfillment of service order as promised,
- d) Concerns about lack of easy access to effective systems for complaint handling and redress,
- e) Concerns about protection of privacy,
- f) Concerns about security of personal information and data transmission,
- g) Concerns that not all transactions are made sufficiently secure and conducted by the authenticated parties.

1.2. Emerging Service Provider Concerns

The principal concerns from the perspective of service providers include:

- a) Uncertainty of business interactions with customers,
- b) Difficulty in winning lasting customer loyalty,
- c) Late order cancellations,
- d) Lack of trust in and credit worthiness of customers,
- e) Potential fraud and misrepresentation,
- f) Increased competition and decline in differentiation between service providers,
- g) Lack of a sufficient international legal framework to regulate trading and relationships,
- h) Rapidly changing customer requirements and expectations.

The Standard provides a basis for development of closer relationships between the customer and service provider by addressing a system of business processes that alleviate customer concerns and provide a sound business context for the service provider. The philosophy and the approach to the Standard are established on the premise of high business ethics, mutual trust, reliance and interdependence to enter into commercial arrangements that benefit all parties involved.

1.3. Scope of the Standard

The Standard was developed to support the service industry by facilitating a logical framework for establishing, implementing, and continuous enhancement of essential policies, procedures and process controls.

The requirements described in this Standard are provided to assist personnel involved in the design, development, implementation and maintenance of the Customer Service Management System to deliver better services to customers.

The Standard provides organizations with the necessary elements to develop a vision of best practice performance in the delivery of customer service excellence. It defines the management system requirements to enable the provision of quality service and also facilitates the development of international best practice.

For the purpose of recognition of organizations that have successfully applied the standard to their organizational processes, the eCS Board™ manages certification scheme of Customer Service Management Systems through third party certification bodies that comply with the eCSB's certification rules.

If some of the requirements of the Standard cannot be implemented due to the scope of an organization's business model, exclusions for certification purposes may apply.

The requirements of this Standard that impact on the organization's capability to deliver excellent service to customers cannot be considered for exclusion. No exclusions will be considered where an organization clearly has a legal or ethical responsibility for the protection of privacy and security of their customer's personal information.

Organizations that are able to demonstrate compliance to the Standard may be certified by an accredited third party certification body and be permitted to display the CSMS™: 2003 Seal of Approval as described on the Web site: www.ecsb.net.

2. Terms and Definitions

Balanced Scorecard

A measurement system that describes the results of business activity from a variety of important shareholder, customer, employee, and supplier business perspectives.

Benchmarking

The process of comparing process performance measures between organizations in order to discover best practice and to share the best practices for the purpose of improving their own performance.

Best Practice

A process whose performance level is recognized in its industry as “best in class” or the service level is measured between 4 to 6 sigma with respect to a broadly accepted customer service standard.

Core Competence

The combination of knowledge, skills, processes and capabilities that an organization has accumulated in order to differentiate its performance from competitors.

Communication Channels

Media, means, materials used for the purpose of communicating with customers.

Compliance Assessment

The systematic and documented process for obtaining and evaluating objective evidence to determine the extent to which the requirements of the Standard are met and defining the opportunities for improvement of the customer service management system.

Certification Audit

The systematic and documented process conducted by an independent accredited certification body for obtaining and evaluating objective evidence to determine the extent to which the requirements of the Standard are met.

Complaint Resolution Management

The process of detecting customer complaints at an early stage, logging complaints into a management system, transferring complaints to the appropriate individual for action, monitoring the action taken, informing customers of the action taken and the final resolution, and closing the complaint log.

Customer Dashboard

A business process measurement system restricted to actionable measures that have been demonstrated to anticipate achievement of business objectives. Measures included in a customer dashboard are supported by diagnostic measurement systems and are used for troubleshooting whenever the top-level business measures indicate that there is a problem.

Customer Relationship Management

The activity of managing customer information and requirements to assure that the true needs of customers are known and met.

Customer Segmentation

The logical division of a market into 'analytical units' that share common properties and behave in similar ways under changes to market conditions. For instance, customer segmentation may be by demographics, application, or geography. Logical schemes for customer segmentation will have differing degrees of predictive capability for their underlying market dynamics.

Customer Service Charter

The documented set of organizational pledges, promises, warranties, guarantees, or service performance commitments made to customers.

Customer Service Enhancements

Improvements made to customer service processes and practices aimed at increasing customer satisfaction and reliability while concurrently fulfilling both the expressed and implicit customer requirements.

Customer Service Excellence

Excellence in customer service occurs when the customer service value proposition exceeds the performance within an industry and also exceeds the expectations of customers.

Customer Service Level Agreement

A Customer Service Level Agreement (SLA) specifies the performance action that will be taken, the level of performance that will be achieved, the measurement system for detecting performance as well as the sensitivity of the measurement system for detecting changes in performance. It includes the countermeasures that will be undertaken when the measurement system shows the process is not capable, and the corrective action to resolve the observed business performance problem.

Customer Service Management System

A management system for planning, directing, controlling and improving customer service activities and resources.

Customer Value Proposition

The total commercial package offered to customers in response to their expressed or implied requirements. Value is determined by customer judgment if this commercial package is worth what they are asked to pay for it.

EU Directive 95/46

A directive issued jointly by the European Parliament and the Council on Protection of Individuals with regard to processing of personal data and free movement of such data in light of concerns for privacy of personal information and security for its management.

ISO9000

The International Standard that defines the basic requirements of a quality management system from the viewpoint of a customer-supplier relationship.

Governance System

The system by which an organization sets its strategic direction and operates on behalf of its shareholders in order to serve its markets and derive benefits for its stakeholders. Governance systems begin with a top-level board of directors and cascade into the structure of the organization.

Performance Management

The process of managing to achieve targeted results on performance indexes that have been deemed important by management and expressed in either a balanced scorecard or a customer dashboard. The performance management system includes data collection, data analysis, reporting and follow-through management processes.

Process Capability

The ability of a process to operate according to its customer requirements in the face of both known and unknown sources of variation

Process Owner

The individual that has been delegated decision rights and has stewardship authority over a process, thereby exercising the greatest span of control and influence over that process.

Risk Management

The process of identifying business risk, assessing the impact of this risk, as well as protecting the organization through a proactive process of opportunity identification and processes to capture the positive benefits of risk as well as to avoid the negative consequences of risk.

Six Sigma

The operating philosophy and business process measurement system that seeks to achieve consistent and flawless execution of work processes as measured against the requirements of customers, despite the presence of natural variation in the way that the work is performed.

Supply Chain

Set of planning and management control processes designed to enable a reliable supply of products or services required for the provision of customer services.

3. Fundamentals of Business and Service Excellence

All businesses are service businesses because they serve customers in some way. As such it is important that business leaders decide their strategy for delivering value to the customer in a way that differentiates their organization from the competition.

Customer Service Management Standard™ describes a system of best practice that, taken collectively, can establish a significant business advantage over organizations that do not choose to implement this approach. Further, the Customer Service Management Standard™ requirements form the basis for achieving excellence in customer service.

The path towards Customer Service Excellence starts with adoption of appropriate business and service strategies.

3.1. Business and Service Strategy Formulation

In order to deliver value to shareholders, customers, employees and community at large all organizations are required to operate at different levels of focus and attention to detail.

To achieve Operational Excellence the focus must be placed on flawless execution of routine activities and tasks. To assure effective, economic and efficient service delivery organizations must manage all work processes in accordance with a structured customer service management system.

To achieve Market Excellence organizations must focus on developing their business through successful marketing of services in highly competitive environments. The emphasis must be placed on delivering the customer value proposition and successfully developing brand value in the market place. The recognition for market excellence is always a prerogative of customer's judgment based on acceptance of delivered service quality.

To achieve Business Excellence focus must be placed on improving processes, activities and tasks required for maintaining operational and market excellence. The emphasis must be on creating an enduring system of managing business processes that deliver superior medium to long term rewards and benefits to shareholders whilst maintaining operational and market excellence.

Exceptional performance in an organization occurs when the activities across these three levels are well coordinated and based on a common goal. The key business objective for every organization wishing to attain and sustain customer service excellence should be based on achieving zero defections – customers do not leave but remain loyal in their future service consumption choices – while also delivering continuous profitable growth. To achieve this objective an organization must be capable of flawlessly executing the performance that its customers require. This requires that the organization have an operational performance management system that measures the work performed against the true customer requirements.

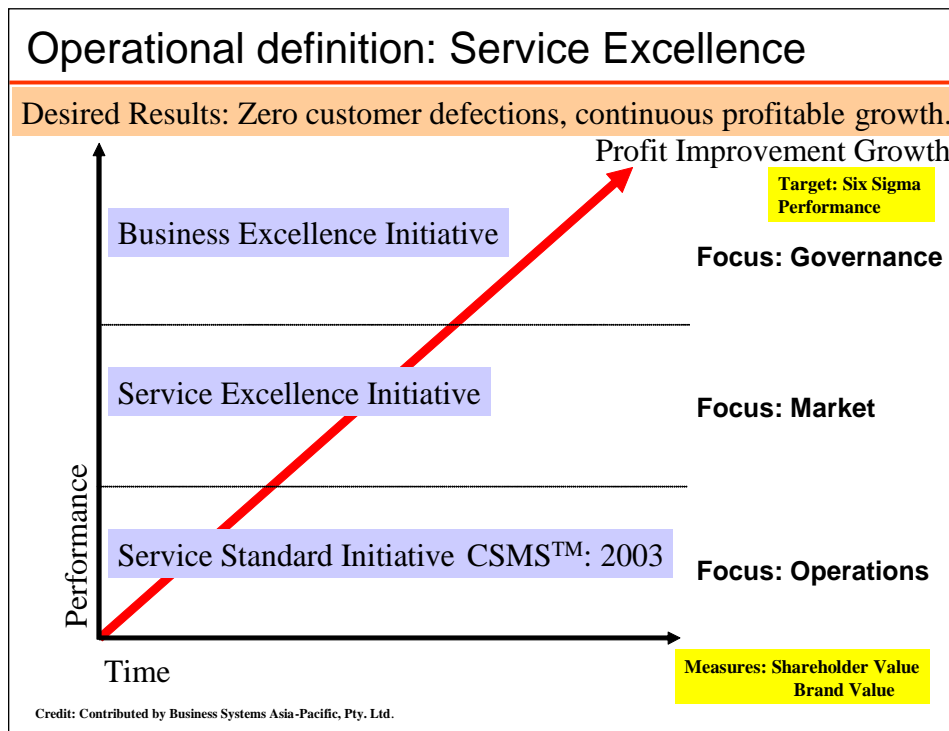


Figure 1: Service Excellence and the Role of CSMS™: 2003

3.2. CSMS™:2003 as a Basis for Service Excellence

There are three levels of engagement as organizations seek to improve performance relative to customer service:

- a) Service Standard Initiative – Implementing the outcomes of improvement projects that are conducted at the operational level of the organization to assure that consistency, courtesy, clarity and correctness of the service value proposition are delivered at the point of engagement of customers.
- b) Service Excellence Initiative – Implementing the outcomes of improvement projects that are conducted at the business level to focus on achieving a competitive distinction in the market relative to the customer expectations and service value proposition.
- c) Business Excellence Initiative – Implementing the outcomes of improvement projects that are conducted at the highest levels of the organization to drive corporate governance and excellent business performance

3.3. Guiding Principles of Sustainable Service Excellence

In order to achieve and sustain excellence in the routine operations that deliver customer service, it is essential that organizations establish policies and implement business strategies based on a set of guiding principles extracted from the best international practices of service organizations:

- a) Operating philosophy must encourage employee sensitivity toward customers,
- b) Customers interact with the performance of processes at 'touch points,'
- c) Competitive customer measurements must observe variation over time,
- d) Service level agreement guarantees must be based on objective metrics,
- e) Customer requirements must be regularly reviewed to assure competitive capability,
- f) All management levels must be actively engaged in customer support,
- g) The target for performance achievement should be zero defections,
- h) Closed loop customer complaint system must be tied to performance incentives,
- i) Employee incentives must be tied to customer engagement measurements,
- j) Service improvement strategy must be linked to resources allocation of capital,
- k) Annual improvement projects must deliver performance gains to bottom line without loss of customer satisfaction and other measures of external customer perception.

3.4. Performance Management and Business Measurement

Business measures are essential to developing a customer-focused performance management system and these measurements must be traceable from the strategy formulation level using consolidated business metrics to the front-line level where processes are measured directly at the point of customer engagement.

This line-of-sight traceability must also reflect the logical and statistical relationships among the measures in order to create a predictive measurement system where the outcome strongly correlates with the input drivers. The performance may be estimated using interim measurements without waiting for the final process steps before learning about the process outcome.

3.5. Balanced Scorecard and Customer Dashboard

The business measurement system should be action-oriented at the front-line to assure that timely corrective action is taken when the measurement system first appears to be indicating lack of compliance with the customer specified requirements.

Customer dashboards must be consolidated upwards in the organization from the front line to reflect the total performance perspective. This must be done in a way that preserves the ability to find the sources of variation through process analysis and use of statistical techniques. The measurement of an organization's customer value proposition must be flawless execution measured against customer service specification. Six sigma standard of performance relative to the customer requirement is the ultimate goal.

Customer Service Management Standard™ Requirements

4. Customer Service Policy Management

The Customer Service Policy describes management direction and focus for executing its overall customer service strategy by establishing, implementing and maintaining an effective Customer Service Management System.

4.1. Core Values of Customer Service

A Customer Service Management System must be established on a set of core values that define working relationships between employees while also establishing the basic set of principles for working with customers. There are four aspects of core values that should be the foundation for an organization's Customer Service Policy:

- a) Respect for the individual – providing people with the opportunity to succeed – this concept applies to both customers and employees. For employees who work in the Customer Service Management System it requires that they be provided with three work conditions that allow management to hold them accountable for the quality of their work:
 - ◆ Employees job requirements must be specified and measured,
 - ◆ Employees must have real-time knowledge of their performance relative to the expectation, and
 - ◆ Employees must have the authority and ability to self-regulate their work in order to meet the targeted performance.
- b) Continuous learning – providing people and organizations with the opportunity to study and learn – this concept applies to both customers and employees. For the customer it is essential that they continue to discover ways to improve the use or application of products and services. For the employees it is essential that they continue to grow and enhance their capabilities to serve customers in their chosen work functions.
- c) Customer first – providing the organization with a shared viewpoint that customers are the most important reason for being in business. For the customer this value is a dedication to the support of their value proposition and provides assurance of the priority that customer have in the organization's business model. For employees this value is a constant reminder to seek the customer perspective for all actions that will be taken by the organization.
- d) Achievement – providing the organization with a target for performance and the need to accomplish its objectives. For the customer this value means that the organization takes responsibility for delivering their requirements and that all of the employees will work on their behalf. For employees this value is a commitment to the pursuit of excellence – achieving ever-higher performance in servicing their customers.

4.2. Policy Formulation Requirements

The organization shall include customer service requirements in the strategic planning process and management shall develop appropriate business strategies to address continuous improvement of customer service performance measured by the key performance indicators.

The organization shall formulate a clear and concise set of policies and demonstrate commitment to the highest appropriate levels of information security, protection of privacy, and provision of superior services to customers. Senior management shall ensure that these policies are fully adopted and followed through an active review process.

4.3. Policy on Customer Service

Management shall establish and document a Customer Service Policy that is promulgated to all staff, contractors and customers. The Customer Service Policy shall consist of clear and concise statements to demonstrate commitment to the provision of the highest quality customer service and shall have reference to:

- a) Customer Service Charter for the purpose of measuring compliance with the policy,
- b) Objectives and scope of the customer service management system,
- c) Strategies and initiatives supporting the philosophy and principles of the Customer Service Management System,
- d) Measurements that link Customer Service Management System excellence to front-line activities,
- e) Commitment to full compliance with the Standard and other relevant standards,
- f) Commitment to a rapid response complaint management and resolution process,
- g) Initiatives for the continual review of the adequacy of the Customer Service Policy,
- h) Documentation supporting compliance with the Customer Service Policy,
- i) Operational review of performance measures to assure continued compliance,
- j) Regular management review of the system to assure adherence to procedures,
- k) References to other applicable standards and legislative requirements,
- l) References to documentation supporting the policy

4.4. Evaluation of Policy Effectiveness

The senior manager designated as the customer service process owner, responsible for the maintenance and enhancement of the policy provisions shall issue and maintain the policies.

In order to ensure that policies reflect the current needs of both the customer and the organization, a regular review of effectiveness shall be carried out. This review shall include but not be limited to the following:

- a) Impact on the organizational capability to fulfill customer requirements,
- b) Impact of technological changes on the organizational capability to meet customer requirements,
- c) Growth of customer trust in the organization through the deployment of appropriate policy as indicated by improvement in such measures as brand value, customer loyalty, complaint resolution, customer satisfaction and competitive advantage.
- d) Impact of consistent delivery of the Customer Value Proposition on the growth of revenue and improvement in financial performance.

4.5. Customer Value Proposition

In order to earn customer loyalty and ensure that customer requirements are met it is essential for the organization to formulate the most attractive Customer Value Proposition. Customer Value Proposition should contain the total package offered to the customer in response to expressed or implied customer requirements at a price that the customer believes is worth what they have paid for.

The organization shall establish, implement and maintain a process for defining the Customer Value Proposition against the established customer requirements and expectations. The process shall include the total cycle from receipt of request for service, and making the commitment to deliver as requested, through to maintaining the capability to deliver the service as promised.

The organization shall ensure that the products and services are configured, packaged and offered to customers based on the value as perceived by the customers.

The organization shall deploy appropriate strategies to ensure that the promised products and services contain a clearly recognizable value proposition by customers.

The organization shall recognize that the Customer Value Proposition is expressed as a total package offered to the customer, and as such it must be quantifiable and assessable.

4.6. Customer Service Charter

The organization shall establish, document and communicate the Customer Service Charter and/or service level agreements to its customers. The Customer Service Charter undertakings shall be measurable and capable of responding to changing customer requirements.

The contents of the Customer Service Charter and/or service level agreements shall include the following but not be limited to:

- a) Explanation of the customer relationship management,
- b) Accessibility of the organization to customers,
- c) Information security and protection of privacy,
- d) Explanation of service guarantees and claims processing,
- e) Commitment to rapid and fair resolution of customer complaints and problems.
- f) Responsiveness to customer service requests,

Appropriate customer communications channels shall be used to communicate changes and updates to the Customer Service Charter and where applicable to service level agreements.

5. Customer Service System Architecture Management

This section defines the requirements for definition of the structure and the architecture of the Customer Service Management System.

5.1. The Basic Architecture Requirement

The organization shall determine and document the structure and contents of its management system for the provision of excellent customer service. This documentation shall outline the key planning, execution, monitoring and controlling elements comprising the system. The system when implemented shall comply with all the requirements of the Standard and relevant legislation.

The organization shall define and document all necessary policies, procedures and instructions in a suitable Manual format and ensure that these are actively promulgated amongst all staff and contractors.

5.2. Customer Service Measurement Map

The organization shall define the customer service measurement system and identify the measurement control points – the place at which the process can be changed in order to improve its performance. In addition to the measurement map, the way that customers can complain should be identified as a customer listening system that engages all employees in reporting customer concerns observed by employees, no matter where the complaint originated. This shall be part of the Customer Service Management System Architecture.

5.3 Business Planning for Customer Service Excellence

The organization shall incorporate the requirement for implementation, maintenance and continuous enhancement of customer service management system in the organization's business model and Strategic Business Plan. The Plan shall contain

details of underlying strategies and provision for resources necessary for achievement of operational and market excellence and shall be reviewed at regular intervals.

6. Responsibility for Customer Service Management System

Top management is responsible for delegating authority for establishing, implementing and maintaining the Customer Service Management System.

6.1. Assignment of Responsibilities

The organization shall define the responsibilities and authorities for the establishment, implementation and maintenance of the Customer Service Management System.

Senior management shall appoint at least one person with the authority to discharge all assigned duties regarding customer service fulfillment.

Responsibilities and corresponding authorities shall be clearly defined and documented by senior management to enable the effective execution of the system's controls.

The person(s) appointed to the position(s), irrespective of any other responsibility, shall have a clear mandate to discharge their assigned responsibilities, including:

- a) Ensuring that the Customer Service Management System is implemented and maintained in full compliance with the Standard,
- b) Reporting to senior management on the achieved outcomes and the overall system's effectiveness,
- c) Ensuring that management and staff are aware of the customer requirements and the expectations in regard to customer service and fulfillment of service orders.

7. New Service Development Management

This section defines the requirements for the control and management of the new service development and execution cycle. It also includes development of specific enhancements to existing services.

7.1. Innovation and Development of New Services

A systematic process shall be established to gather and input the feedback from customers into the design of new services. This process shall include the identification and review of customer requirements, feedback, suggestions and complaints as well as comparison of current services with those of direct competitors.

The organization shall maintain details on:

- a) Customer involvement in planning,
- b) Interpretation of customer feedback,

- c) Sources of customer information,
- d) Use of customer information,
- e) Response to customers information,
- f) Sources of competitive information,
- g) Use of competitive information

7.2. Determination of Service Development Process Requirements

The organization shall determine and document the processes and the responsibilities for the development of new or enhanced services. These shall be established to ensure that service development activities are effectively controlled and managed in compliance with the requirements of this Standard.

7.3. Key Steps in the New and Enhanced Service Development Cycle

The organization shall incorporate the following steps in new or enhanced services development:

- a) Idea Evaluation and Endorsement,
- b) Formalization of New or Enhanced Service Projects,
- c) New or Enhanced Service Rollout Planning,
- d) Design Validation of New or Enhanced Services.

7.4. Idea Evaluation and Endorsement

The organization shall establish and document processes, which allow all innovative ideas to be rigorously assessed. The processes established shall ensure that the feasibility of the idea and the conceptual requirements of the service are assessed and documented to allow for assessment of financial viability. The organization shall further define the parameters, processes and authorities assigned to endorse innovative ideas for further development.

7.5. Formalization of New or Enhanced Service Projects

The organization shall determine and document a structured process for new or enhanced service formulation, encompassing:

- a) Development of team skills definitions and team selection,
- b) Identification and engagement of all stakeholders,
- c) Market assessment and evaluation,
- d) Development of methodology and project management,

- e) Reporting and review,
- f) Impact of implementation on infrastructure,
- g) Impact of implementation on existing systems, products and customers,
- h) Plan for validation of economic and social contribution to customers, community and the organization.

7.6. New or Enhanced Service Rollout Planning

The organization shall determine and document:

- a) Project parameters and measures, and reporting processes to enable successful deployment of chosen solutions,
- b) Parameters, measures and authorities to deploy new and/or enhanced services,
- c) Processes for deployment, including risk assessment, decision making points, measures and authorities,
- d) Processes for customer feedback and communication.

7.7. Design Validation of New or Enhanced Services

The organization shall define a process for validation of design of new or enhanced services and document the following:

- a) Validation of service design against design specification prior to service delivery to customers,
- b) Measurement of quality of service delivery,
- c) Determination of economic value to stakeholders,
- d) Determination of contribution of new or enhanced services to the achievement of business objectives,
- e) Control of design changes arising from customer feedback and/or design validation,
- f) Maintenance of records and other support documentation related to new or enhanced services development.

8. Customer Service Process Management

This section defines requirements for the management of customer service processes.

8.1. Market Research

The organization shall establish, implement and maintain processes for conducting market research to determine the general and specific customer requirements and expectations.

The organization shall establish and implement the following:

- a) Process for defining market segments and demographics,
- b) Process for collecting statistically representative data and analysis,
- c) Process for determining the level of customer satisfaction with current products or services,
- d) Process for evaluating data to define appropriate market research response strategies,
- e) Process for the dissemination and utilization of research findings.

8.2. Definition of Service Outcome Specifications

The organization shall specify service outcomes intended to for delivery to customers. Service specifications represent the organization's decisions about customer needs and requirements that were discovered during the market research process. A service specification is the basis for design of the service. Service specifications shall be aligned with the Customer Value Proposition and be used as an input into the organization's New Service Development Process.

8.3. Marketing of Services

The organization shall market its products and services in accordance with the defined Customer Value Proposition. Any information provided for the purpose of communicating to customer shall be consistent with Customer Service Charter and Customer Service Policy.

8.4. Planning of Service Delivery Processes

The organization shall plan for the development, implementation and control of customer service delivery processes. These processes shall be documented in the Service Delivery Plan(s) and records shall be kept of all planning, operational control, and review activities.

The organization shall implement and maintain processes for the development of customer relationships based on delivery of the Customer Value Proposition and continuous service enhancements.

8.4.1. Planning of the Service Delivery

The following activities shall be included but not be limited to:

- a) Involvement of customers in the design of future service requirements,
- b) Determination of customer and process requirements,
- c) Determination of the inputs and outputs for service delivery,
- d) Determination of the resource requirements,

- e) Determination of special service delivery requirements,
- f) Definition of control mechanisms for the monitoring of service delivery.

8.4.2. Planning of Implementation

The following activities shall be included but not be limited to:

- a) Processes for initiation and execution of customer service delivery,
- b) Provision of appropriate skills and competencies,
- c) Resources for maintaining the capability to meet customer requirements on an ongoing basis,
- d) Planning of personnel competencies and training requirements,
- e) Requirements for the implementation of process controls at appropriate stages of the customer delivery process,
- f) Requirements for maintaining records of process controls used in the delivery of service to customers.

8.4.3. Planning of Monitoring of Service Delivery Processes

The following activities shall be included but not be limited to:

- a) Definition of the criteria to review the effectiveness of customer delivery processes,
- b) Requirements for monitoring the delivery of customer service against defined targets,
- c) Planning for involvement of customers in the new service design and review processes,
- d) Requirements for conducting management reviews to monitor the effectiveness of the planning processes and their outcomes.

8.4.4. Customer Service Risk Management

The organization shall establish, implement, and maintain customer service risk management procedures. The risk management procedures shall clearly define and document both the process and methodology for the minimization of risk.

The management shall establish the risk management context and framework within which the processes will operate. The customer risk management procedures shall consist of the following, but not be limited to:

8.4.5. Risk Identification

- a) A process for identification and documentation of risks associated with the provision of customer service shall be defined and documented,

- b) Records of identified risks shall be maintained.

8.4.6. Risk Analysis and Evaluation

- a) A process for analysis and evaluation of identified risks shall be defined and documented,
- b) Analysis of risks shall consider the relative seriousness of consequences to business and customer service delivery processes,
- c) Quantitative measures shall be applied in the evaluation of risk consequences and an appropriate ranking shall be assigned to each identified risk.

8.4.7. Formulation and Implementation of Risk Management Strategies

- a) A process for implementation of risk management strategies shall be clearly defined and documented,
- b) The organization shall deploy appropriate control mechanisms to ensure that risks are managed in accordance with assigned rankings.

8.4.8. Risk Management Review

- a) A process for review of risk management shall be defined and documented,
- b) Records of risk management reviews shall be maintained,
- c) Risk management strategies shall be reviewed for their effectiveness during regular management review meetings.

8.5. Service Order Fulfillment

The organization shall maintain processes and controls that ensure integrity of the entire service delivery process, including the supply chain. Control mechanisms shall be implemented to enable the fulfillment of customer orders and associated supply orders, including the monitoring of performance of external and internal suppliers.

The organization shall establish, implement and maintain procedures for enabling service order fulfillment while complying with all relevant legislative and other requirements.

The organization shall develop key performance measures, implement measurement of the service delivery performance, and review service delivery processes for their effectiveness against customer requirements.

The organization shall maintain relationships with key suppliers to ensure a seamless flow of supplies required for the service order fulfillment.

The organization shall ensure that service orders are executed in accordance with relevant policies, procedures, work instructions and service delivery plans. Records demonstrating full conformance with service delivery requirements shall be maintained by the organization.

8.6. Supply Chain Management

The organization shall maintain processes and controls that ensure integrity of the entire service delivery process, including the supply chain. Control mechanisms shall be implemented to enable the fulfillment of customer orders and associated supply orders, including the monitoring of performance of external and internal suppliers.

The organization shall establish, implement and maintain procedures for enabling service order fulfillment while complying with all relevant legislative and other requirements.

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The organization shall ensure that service orders are executed in accordance with relevant policies, procedures, work instructions and service delivery plans. Records demonstrating full conformance with service delivery requirements shall be maintained by the organization.

8.6.1. Supply Chain Planning

The organization shall determine and implement supply management processes to ensure continuous and predictable provision of customer service. The supply chain planning process shall consider:

- a) Customer demand management,
- b) Supplier capability to supply,
- c) Supply and distribution processes,
- d) Quality of procured products and services,
- e) Logistics and product distribution,
- f) Integration of Supply Planning, Execution and Control.

8.6.2. Approval and Review of Suppliers

The organization shall ensure that products or services supplied for the purpose of delivering excellent customer service conform to all specified requirements. Suitable process controls applied to the supply chain shall be determined and records of supplier performance shall be maintained.

8.6.3. Supply Chain Management

Management of the supply chain is recognized as an integral and critical part of the reliable service delivery.

The organization shall define procedures for identification of critical supply chain processes that impact on the overall competitiveness and the ability to provide excellent customer service.

The organization shall establish and implement processes for management of performance of the entire supply chain. The organization shall determine the appropriate measures and implement procedures for continuous monitoring of supply chain performance.

The effectiveness of supply chain management shall be reviewed at regular Management Review meetings and records of these reviews shall be maintained.

8.7. Management of Customer Relations

8.7.1. Interaction with Customers

The organization shall establish, implement and maintain processes for the creation of database and management of customer relations.

Senior management shall assign responsibilities and authorities for the development and deployment of processes aimed at establishing and maintaining relationships with customers.

Customer relationship development outcomes, associated systems and processes shall be reviewed on a regular basis during management reviews.

8.7.2. Privacy of Customer Data

The organization shall establish and maintain customer information that is necessary for the provision of the required products and services. This information shall be managed in accordance with legislation, privacy and information security requirements defined in the Standard.

Information shall be collected and maintained to enable delivery of service, analysis and review of the relationship between the customer and the organization.

Where personal information is involved, the organization shall offer an “opt-out” choice to customers when collecting and or using personal information. If consented, this data may be used for the identification of future requirements, opportunities and customer service enhancements.

The organization shall ensure that customer personal data and sensitive information is managed in full compliance with the applicable privacy legislation. Where such national legislation does not exist, management of personal data and information shall comply with the European Parliament EC Directive 95/46 and its subsequent future legislative directives.

Where required, customer data including records of transactions shall be maintained to enable effective product and service delivery and after sales service.

8.7.3. Security of Customer Data

The organization shall determine and document the responsibilities and the processes for deployment of security policies and control of changes to the existing systems and databases.

These shall include but not be limited to:

- a) Information security policy
- b) Process for prevention and/or detection of security incidents and breaches
- c) Response to security incidents and breaches
- d) Review of customer data security policies

To ensure appropriate information security, the organization shall establish and document processes for the collection, storage, backup, retrieval of and access to operating data including personal records, transactions' logs, change control records and other relevant activities.

8.7.4. Communication with Customers

The organization shall determine the most appropriate channels for maintaining effective communication with customers.

The impact of communication strategies on the development of brand value and customer trust shall be determined at regular intervals.

The organization shall establish and implement procedures for handling inbound communication including but not limited to:

- a) Product or service information requests and queries,
- b) Customer feedback,
- c) Customer complaints, problems, concerns, interests,
- d) Privacy and security information queries.

The organization shall establish and implement procedures for handling outbound communication, including but not limited to:

- a) Information on products and services provided,
- b) Information on the initiatives and changes to services based on customer feedback,
- c) Product and Services availability,
- d) Customer Service Charter,
- e) Delivery time and location(s),
- f) Service costs,
- g) Channels of communication,

- h) Trading Terms and Conditions,
- i) Privacy policy and information security policy,
- j) Dispute resolution and complaint handling protocol,
- k) Organizational contact details,
- l) General information on organizational activities and people,
- m) Information on the provision of after sales service, if applicable.

The organization shall have a process to ensure that communication with customers is direct, frequent and relevant to the customers' changing requirements.

Records of inbound and outbound customer communication shall be maintained and made available for analysis, review and improvement activities.

8.8. Service Enhancements and Continuous Improvement

The organization shall continually enhance the customer service delivery processes through customer service improvement activities. The enhancement activities undertaken shall be clearly defined and documented.

The organization shall establish, implement and maintain a process for promotion and support of customer service improvements.

Procedures shall facilitate the identification, analysis, implementation and review of customer service improvements. The management shall provide resources necessary to facilitate the achievement of service enhancements.

8.8.1. Knowledge Management and Employee Participation

The organization shall establish a process for knowledge management, development of intellectual property and the effective application of knowledge in delivering the Customer Value Proposition.

The organization shall maintain processes enabling employee participation in customer service enhancement activities.

Employees participating in the customer service enhancement activities shall be provided with training to acquire adequate skills to effectively contribute and participate.

9. Training and Development Management

This section defines the requirements for planned and controlled training and development of management and staff.

9.1. The Training and Staff Development Requirements

The organization shall ensure that all personnel are adequately equipped with the required competencies to deliver excellent customer service.

Staff training and development activities shall focus on building the organizational capability to enable a sustainable innovative approach to customer service systems development, process improvement and to the provision of excellent customer service.

The management shall:

- a) Determine the necessary competencies required for the provision of current and future services to customers,
- b) Provide the necessary training to assure adequate competencies are available for current and future operational and developmental needs,
- c) On a regular basis, evaluate the effectiveness of training and monitor the performance of personnel against set targets,
- d) Ensure understanding of employee obligations in achieving full compliance with the Standard,
- e) Maintain training effectiveness evaluation records,
- f) Maintain a register or database of all staff skills and competencies available to the organization for delivery of customer service.

10. Customer Complaint Resolution Management

This section defines requirements for the effective management and resolution of customer complaints.

10.1. The Complaint Handling and Resolution Requirements

The organization shall establish, implement and maintain a suitable system for the identification, documentation and resolution of complaints, concerns, problems, and grievances. The system shall provide rapid response to identified problems and issues.

Senior management shall assign authorities and responsibilities for complaint management and resolution.

Sufficient and appropriately skilled resources shall be available for investigation, reporting and resolution of complaints, concerns, problems, and grievances. A process for the recording of customer complaints and subsequent outcomes shall be established and maintained.

The customer complaint handling management system shall be fair, taking into consideration the interests of all parties involved.

The complaint handling and resolution process shall be monitored and reviewed on a regular basis to assess its effectiveness in reducing complaints and the improvement of customer service.

10.2. Complaint Handling

The organization shall establish documented procedures for processing customer complaints. The following item shall be addressed:

- a) Identification and Reporting,
- b) Complaint Investigation,
- c) Complaint Risk Assessment,
- d) Complaint Resolution,
- e) Rapid Response to Customer,
- f) Problem Escalation,
- g) Complaints Handling and Resolution Process Review.

11. Problem Management

This section defines the requirements for the effective management of problems including corrective and preventive initiatives and resultant actions.

11.1. The Corrective Action Requirements

The organization shall establish a system for identifying, recording, reducing and or eliminating the causes of problems, especially repetitive problems and non-conformities. The system's procedures for corrective action, as a minimum, shall include the following requirements:

- a) Process for the identification of problems and opportunities for improvement,
- b) Process for the determination of causes and quantification of risk,
- c) Process for the evaluation of alternative solutions,
- d) Process for the control of the implementation of corrective action solution,
- e) Process for records maintenance and the review of the effectiveness of corrective action taken,
- f) Process for the analysis and monitoring of trends including application of relevant statistical measurements.

11.2. The Preventive Action Requirements

The organization shall establish a system for preventing the occurrence of potential problems. The system's procedures for preventive action, as a minimum shall include the following requirements:

- a) Process for the identification of causes of problems and opportunities for improvement,
- b) Process for the determination and quantification of risk,
- c) Process for the evaluation of alternative solutions,
- d) Process for the control of the implementation of preventive action solution,
- e) Process for records maintenance and the review of the effectiveness of preventive action taken,
- f) Process for the analysis and monitoring of trends including application of relevant statistical measurements.

12. Records and Database Management

This section defines the requirements for control and management of electronic and hard copy records associated with the provision of services.

12.1. The Control of Records Requirements

The organization shall establish, implement and maintain a system for control and management of records. All records shall be classified to enable the differentiation of control levels, including security access privileges and information use and disclosure.

The organization shall maintain procedures for the identification and classification of records, secure storage, authorized access, retrieval systems and disposal of obsolete records.

The organization shall institute procedures and controls to ensure that all personal and sensitive information is appropriately protected from unauthorized access, use and disclosure in compliance with the relevant legislation or code of practice.

The organization shall ensure that adequate security policies are in place to ensure that information is safely stored, accessed, used and disclosed only by the authorized personnel.

12.2. The Database Management Requirements

The organization shall define procedures for management of information systems and databases associated with the provision of customer service.

The organization shall establish, implement and maintain policies and procedures relating to:

- a) Control of changes to interfaces within the information management system,
- b) Control of changes to applications supported by the information management system,
- c) Control of changes to databases associated with the information management system, whether under direct control of the organization or provided by a third party,
- d) Maintenance and control of records of system operation, performance indicators and measures, and history logs of transactions and operations,
- e) Provision of operational and data back-up facilities, including disaster recovery and service continuity provisions,
- f) Targets for accuracy, currency and updates of databases.

12.3. Database Control

The organization shall determine the responsibilities and the processes for managing all changes to existing systems and databases. These shall include:

- a) Pre-implementation impact assessment against applicable standards, protocols and policies, in respect to existing systems and databases, and in relation to existing customers,
- b) Back up systems,
- c) Disaster Recovery and Business Continuity Planning,
- d) Post-implementation assessment and review,
- e) Defined authorities to proceed at each stage of the change management process.

The organization shall establish operational policies and define change management authorities. The organization shall ensure that changes to systems and databases provided by external parties are managed effectively within the authorized change management processes of the organization.

The organization shall establish operating procedures in respect of the collection, storage and backup of, and access to operating records, quality measurements, transactions' logs and change control records.

The organization shall define responsibilities for collection, analysis, reporting, storing (including backup), archiving and the retrieval of records.

The organization shall ensure that electronic records containing particularly sensitive information are protected from unauthorized access, use and disclosure through the deployment of security policies commensurate with levels of risk.

13. Document and Version Change Control Management

This section defines the requirements for the control of documents, version changes, and web site contents management.

13.1. The Control Requirements

The organization shall establish, implement and maintain procedures for the control of changes to documents, web site content and versions. The procedures shall provide for controls to ensure that:

- a) All documents, versions, and web site content are approved for publication prior to release,
- b) All documents, versions, and web site content are reviewed, and if appropriate, reissued,
- c) The latest version is available to users at appropriate locations,
- d) All obsolete documents are removed from circulation to ensure that any inadvertent use of obsolete documents is prevented.

The organization shall maintain a current list of all revisions and changes to documents, versions and web site content, clearly showing the latest approved issue. All documents, versions, and web site content shall be subjected to appropriate process controls. They shall be capable of easy retrieval, legible at all times and accessible only by the authorized personnel.

The organization shall classify all documents to ensure that appropriate security measures are applied to secure and protect data and information.

14. Systems Support Management

This section defines the requirements for the management of maintenance and support activities related to customer service information systems.

14.1. The Maintenance and Support Requirements

The organization shall establish policies, procedures and standards to ensure that the Customer Service Management System information and associated infrastructure are appropriately maintained and supported to continually comply with the requirements of this Standard.

The organization shall establish, implement and maintain policies and procedures relating to:

- a) Technical support of the Customer Service Management System including all applications, databases, and content, and their integration in the system,

- b) Support for applications hosted, accessed or used by the Customer Service Management System,
- c) Skills and training required for operatives and supervisors,
- d) Maintenance and control of records of system maintenance and support,
- e) Standards for operational performance and the acceptable impact of planned maintenance activities.

The organization shall maintain records of maintenance and technical support activities relevant to the customer management system and the provision of customer service.

15. Service Performance Management

This section defines the requirements for the management of the performance of the Customer Service Management System.

15.1. Performance Measurement Requirements

The organization shall determine key performance indicators that will define the performance of the Customer Service Management System. These performance measures shall reflect the requirements of the key stakeholders in the system, as well as providing measures of the performance and effectiveness of the system.

The organization shall define processes for determination of metrics and statistical measures related to and relevant to the key performance indicators. The process shall include reporting requirements, and organization authorities and responsibilities in respect to gathering, analyzing and reporting of measures.

Performance targets shall be established for each performance indicator including appropriate scoring or ranking system. The frequency of measurement shall be determined to ensure effective process monitoring and control.

The organization shall institute a formal process for conducting operational reviews of the performance of the Customer Service Management System to ensure that the system is adequate and its application effective at all times. The reviews shall include evaluation of the need for changes to the system in order to facilitate the delivery of service, protection of privacy and continued security of data and information.

The organization shall maintain records of operational reviews including actions initiated and reports on actions taken.

15.1.1. Measuring and Monitoring of Performance

At a minimum, the organization shall measure and monitor the following:

- a) Customer satisfaction,
- b) Staff satisfaction,

- c) Performance against service level agreements,
- d) Fulfillment of customer orders,
- e) Gains achieved through the provision of quality customer service,
- f) Monitoring of employee skills assets and other critical resources,
- g) Level of non-compliance against requirements,
- h) Customer complaints,
- i) Turnaround cycle times from receipt of order to delivery of service,
- j) Total Cost of Customer Service.

The type, location and frequency of measurement and monitoring shall be defined and the results recorded.

Methods for determining the relevance of measurements for the purpose of monitoring service delivery process shall be determined and documented.

Records of measurement and monitoring of performance levels shall be maintained and made available for improvement and review activities.

15.1.2. Statistical Measurement and Analysis

The organization shall utilize appropriate quantitative methods for measuring performance against targets, monitoring trends in process variation and measuring internal performance against external benchmarks for validity and verification.

The measurement system shall be established to support structured performance assessments of customer service processes against established targets and service objectives.

16. Compliance Assessments Management

This section defines the requirements for conducting internal compliance assessments.

16.1. The Compliance Assessment Requirements

The organization shall plan and conduct internal assessments to determine continued compliance with the Standard.

The organization shall ensure that sufficient internal resources are available to carry out these assessments in accordance with the approved schedule.

The organization may deploy a suitable quantitative compliance scoring or ranking methodology to enable continuous enhancement of customer service delivery systems.

The frequency of the internal assessments for compliance with the requirements of this Standard shall be governed by the designated levels of risk to customers and to the organization. Internal assessments shall be conducted by trained person(s) independent from the function being assessed.

The organization shall document procedures for planning, conducting and reporting the findings of internal assessments. Assessment reports shall be reviewed during regular Management Review meetings.

17. Systems Review Management

This section defines the requirement for conducting frequent and regular reviews of the implemented Customer Service Management System.

17.1. The Review Requirements

The organization shall institute formal procedures for conducting management reviews. Senior management shall review the Customer Service Management System at predefined intervals to assure that the system is adequate and its application effective at all times. The review shall include the evaluation of the need for changes to the system in order to facilitate the delivery of enhanced services, improved protection of privacy and security of information.

Senior management shall review at regular intervals the overall effectiveness of the customer service policy, including the implementation of appropriate responses to identified risks.

The organization shall maintain records of management reviews including follow up actions.