



ESF Program "Development of occupational qualifications system"

## Occupational standard

### Customer service manager, level 6

**The occupational standard is a document** that describes the job and competence requirements, i.e. a set of skills, knowledge and attitudes required for successful job performance in a particular occupation.

**The customer service manager occupational standard** is the basis for development of training and educational programmes corresponding to labour market requirements and assessment of competency.

<b>Occupational qualification title</b>	<b>Estonian qualifications framework (EstQF) level</b>
<i>Customer service manager, level 6</i>	<i>6</i>

## Part A

### Job description

<b>A.1 Job description</b>
<p>The objective of the customer service manager's job is to develop a service process in the organisation that creates value for the customer. The content of the customer service manager's job is to determine the requirements and expectations of customers and the development and implementation of a service strategy arising from that; the formation, management and development of a service team; making suggestions for the improvement of processes and operating efficiency. A customer service manager is responsible for the implementation of the service strategy in a team and the effectiveness of the service process. Depending on the size of the company, a customer service manager may also partially perform the duties of the personnel manager, sales director, quality manager and others.</p>
<b>A.2 Units</b>
<p><b>A.2.1 Mapping of customer expectations and analysis of results:</b></p> <ol style="list-style-type: none"><li>1) mapping of customer expectations;</li><li>2) mapping of the customer journey;</li><li>3) mapping of the service process.</li></ol> <p><b>A.2.2 Development and implementation of a service strategy:</b></p> <ol style="list-style-type: none"><li>1) participation in the service strategy development process;</li><li>2) participation in the drafting process of the action plan arising from the service strategy;</li><li>3) implementation of the action plan arising from the service strategy;</li><li>4) management of the service process;</li><li>5) resolution of malfunctions occurring in the service process and crisis management;</li><li>6) measurement of service quality;</li><li>7) direct service of customers.</li></ol> <p><b>A.2.3 Management and development of a team:</b></p> <ol style="list-style-type: none"><li>1) planning of service personnel;</li><li>2) developing and motivating service personnel;</li><li>3) organisation of teamwork;</li><li>4) drafting and updating of documents;</li><li>5) management and leadership.</li></ol>
<b>A.3 Working environment and specific aspects of work</b>
<p>The working hours of a customer service manager may be fixed or flexible. Communication with colleagues and management accounts for a large portion of day-to-day work. Outside of the organisation, a customer service manager must communicate with customers and business partners. The work may be mentally and emotionally demanding with regard to the resolution of problematic situations. A customer service manager's job is closely related to first-level service staff that create value for customers in the organisation.</p>
<b>A.4 Tools</b>
<p>Conventional office tools. Computer and professional software required for the job.</p>
<b>A.5 Personal characteristics necessary for this job: abilities and personality traits</b>
<p>A customer service manager's job is related to instructing service staff and serving customers and requires a readiness to communicate, positive attitude, friendliness and an ability to handle different people. The diverse activities involved in the work require quick and flexible action, accuracy, precision, a positive view towards change and continuous personal development. The material liability resulting from the work requires honesty.</p>



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Patience, a pleasant and polite manner and good communication skills contribute to success at the job.

A customer service manager is expected to be proactive, conscientious, to act with empathy and decisiveness, as well as to be reliable, creative, ability to perform under pressure and good teamwork and communication skills.

#### **A.6 Occupational training**

One can study to become a customer service manager at an institution of higher education and/or on the job.

#### **A.7 Possible job titles**

Service manager, service department manager, customer service manager.

## Part B COMPETENCE REQUIREMENTS

### B.1. The structure of the occupational qualification

In order to apply for the occupational qualification of customer service manager, level 6, a candidate is required to demonstrate all competencies B.2.1–B.2.6.

### B.2 Competences

#### Obligatory competences

B.2.1 Mapping of customer expectations and analysis of results	EstQF level 6
<p><u>Performance indicators:</u></p> <ol style="list-style-type: none"> <li>1) Participates in the determination of the current customer profile of a company and customer satisfaction by determining customer satisfaction and the factors that impact it at the current moment of time;</li> <li>2) Organises and participates in conducting customer research (surveys) in collaboration with the marketing department and/or market research company and explanation of results to employees;</li> <li>3) Analyses the reasons as to why customers contact the company and draws conclusions for necessary improvements and sends recommendations for improvement to the management;</li> <li>4) Maps the customer journey in various service channels in collaboration with the team and business partners for the purpose of providing a journey for the customer to consumption of a product/service that is as convenient and efficient as possible;</li> <li>5) Sends recommendations for improvement regarding the customer journey to the relevant parties;</li> <li>6) Maps the existing service process from the standpoint of customer-oriented logic by documenting everything that occurs in the service process and determining the stages of the service process;</li> <li>7) Analyses the effectiveness of the service process and makes recommendations for improvement of the service process if necessary by formulating their recommendations for improvement to the organisation.</li> </ol>	
<p><u>Supporting knowledge:</u></p> <ol style="list-style-type: none"> <li>1) nature and key concepts of service culture;</li> <li>2) principles of service dominant logic;</li> <li>3) methods of assessment of customer satisfaction and service design;</li> <li>4) simpler methods for data analysis;</li> <li>5) methods for mapping and analysis of the service process.</li> </ol>	
<p><u>Assessment method(s):</u> case study, portfolio, practical assignment.</p>	
B.2.2 Development and implementation of a service strategy	EstQF level 6
<p><u>Performance indicators:</u></p> <ol style="list-style-type: none"> <li>1) Participates in the development of a service strategy, giving their input (customer expectations and satisfaction) to the service strategy of the organisation, doing so by taking into consideration the market position of the organisation and the expectations of the owner/management;</li> <li>2) participates in the process of reviewing and updating the service strategy by monitoring and analysing the customer purchasing behaviour and the strategy behaviour of competitors;</li> </ol>	

- 3) participates in the drafting of an action plan arising from the service strategy by giving their own input regarding the capabilities of employees;
- 4) distributes relevant information arising from the action plan to team members;
- 5) plans the structure of their service team and role allocation based on the service strategy and action plan,
- 6) assesses the competence and efficiency of team members in order to implement the action plan and, if necessary, initiates change by reorganising tasks or involving new team members;
- 7) manages the day-to-day service process by ensuring its smooth functioning and the satisfaction of both internal and external customers;
- 8) assesses the efficiency of the functioning of the service process within the scope of their area of responsibility, if necessary plans and initiates corrective action;
- 9) compiles and analyses performance indicators, draws conclusions and plans corrective action based on the results, if necessary makes recommendations for improvement to the management;
- 10) resolves difficult and/or legally complex customer complaints by taking into account legislation; analyses problems arising in the service process and assesses their potential impacts by assuming responsibility for the resolution of misunderstandings and complaints in the team;
- 11) develops a service recovery strategy that is used to rectify error situations occurring in customer service and to restore customer satisfaction;
- 12) establishes in collaboration with the managers of the organisation a relevant system for the mapping of customer expectations, service quality and service process that is based on the objectives of the organisation;
- 13) measures service quality, compliance with procedural rules and customer satisfaction, analyses the interconnectedness of the results and compares data to imposed requirements and rules and established objectives;
- 14) provides an overview of the results of the survey to the management and division managers and makes recommendations for the improvement and development of the operational process;
- 15) acts as a role model to the customer service team by providing good service to the customer, is service-oriented, supports a customer-focused attitude and participates in serving customers if necessary;
- 16) adheres to principles of customer service when interacting with customers, keeping in mind the organisational values in interaction in person and when using means of communication.

Supporting knowledge:

- 1) principles and methods of service strategy development;
- 2) structure of the service process and its management;
- 3) factors impacting customer behaviour;
- 4) methods for assessment of service quality;
- 5) principles for developing a service standard;
- 6) principles of customer service;
- 7) the nature of the communication process;
- 8) simpler service design methods;
- 9) legislation related to the job.

Assessment method(s): practical assignment, test, case study, essay, portfolio.

**B.2.3 Management and development of a team**

**EstQF level**

**6**

Performance indicators:

- 1) analyses service personnel resources according to organisational needs and, if necessary, makes



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recommendations to the management with regard to the recruitment, selection, development and reallocation of service personnel;

- 2) determines the optimal number of employees and qualification depending on the specific attributes, requirements and strategic objectives of the organisation;
- 3) designs their own team by participating in the recruitment and selection of service staff, analysing employee CVs, participating in job interviews, organising background checks if necessary;
- 4) determines the training requirement of service staff through performance reviews or other methods established internally in the organisation;
- 5) conducts performance reviews with members of their own team according to the procedure of performance reviews established by the organisation;
- 6) analyses the effectiveness of training courses taken by employees and makes recommendations for the development of their team;
- 7) determines the training requirement, coordinates the organisation of job-related seminars and in-house training courses;
- 8) develops a programme for the induction and/or training of new employees by assigning a mentor or instructor and scheduling the required training courses;
- 9) prioritises job tasks according to the objectives of the organisation and delegates tasks to employees, taking into consideration their competence;
- 10) takes care to ensure that team members have adequate information to carry out their jobs, selects appropriate means and channels to transmit information, explains the context to team members and ascertains that they understand it;
- 11) encourages and ensures the full participation of team members and an open line of communication at meetings and in other situations by supporting and maintaining a high level of initiative among team members;
- 12) creates an open and mutually respectful environment where regular feedback is given and accepted for the improvement of job performance;
- 13) creates and uses effectively internal and external communication networks for the timely sharing of necessary information;
- 14) ensures a caring and supportive atmosphere within the team;
- 15) drafts and updates as required the job descriptions and service standards of service staff;
- 16) participates in the drafting and development of an incentive scheme for employees;
- 17) communicates the mission, vision, objectives and core values of the organisation to the employees, encouraging team members to adhere to them through personal example, motivation and devotion;
- 18) cares about people, showing interest in how they are doing, taking the first step;
- 19) behaves in a loyal manner with respect to the organisation, remains a respectable representative of the organisation in every situation and defends the interests of the organisation;
- 20) consciously controls their emotions and behaviour;
- 21) involves the team in changes by personally understanding the need for them;
- 22) develops themselves both professionally and as a personality at their own initiative by acknowledging their deficiencies and weaknesses;
- 23) resolves complex situations in a constructive manner;
- 24) ensures that common goals are achieved through personal example by encouraging, motivating and recognising team members and giving them an opportunity to contribute;
- 25) takes into consideration the team members, keeps their promises, listens and seeks mutual understanding, evaluates situations adequately by addressing things truthfully and behaving proactively and in an assertive manner;

26) creates a positive working atmosphere by encouraging openness, supporting development and diligence, empathy and mutual recognition.

Supporting knowledge:

- 1) effective feedback methods;
- 2) management of group processes and conflict;
- 3) different management styles and their impact on the team;
- 4) management of the organisation;
- 5) principles of organisational behaviour;
- 6) human resource management.

Assessment method(s): role play, interview, self-assessment, case study.

## Transversal competences

### **B.2.4 Communication skills**

Performance indicators:

- 1) communicates professionally and in a dignified manner with both internal and external customers on the basis of good practice and principles of confidentiality;
- 2) understands the diversity of cultures and is tolerant;
- 3) expresses themselves clearly and comprehensively.

### **B.2.5 Teamwork**

Performance indicators:

- 1) understands their role in a team, is able to swiftly assess situations that materialise and act in a manner that is appropriate to the situation (capably);
- 2) adapts to the team and maintains team spirit;
- 3) behaves in a loyal manner with respect to the organisation, remains a respectable representative of the organisation in every situation and defends the interests of the organisation;
- 4) ensures that common goals are achieved by encouraging, motivating and recognising team members and giving them an opportunity to contribute;
- 5) creates a positive working atmosphere by encouraging openness, supporting development and diligence, empathy and mutual recognition.

Supporting knowledge:

- 1) principles of teamwork.

### **B.2.6 Compliance with occupational safety requirements and legislation associated with the job**

Performance indicators:

- 1) adheres to the standards and procedural rules that are in effect at the company;
- 2) adheres to occupational health and safety requirements;
- 3) complies with all of the relevant legislation in their job;
- 4) acts in a capable manner in the event of emergency situations and calls for professional help if necessary.

Supporting knowledge:

- 1) occupational health and safety;
- 2) legislation related to the job.

Assessment method(s): The assessment of transversal competences is integrated with the assessment of all other competencies specified in the occupational standard.

## Part C GENERAL INFORMATION AND ANNEXES

<b>Information on the preparation and approval of the occupational standard, on the body awarding occupational qualifications, and reference to the location of the occupational standard in classifications</b>	
1. Designation of the occupational standard in the register of occupational qualifications	04-11112014-3.1/2k
2. The occupational standard is compiled by:	Katrin Kreegimäe, <i>Estonian Entrepreneurship University of Applied Sciences (Eesti Ettevõtluskõrgkool Mainor)</i> Tiina Merkuljeva, <i>Estonian Entrepreneurship University of Applied Sciences (Eesti Ettevõtluskõrgkool Mainor)</i> Gerle Oks, <i>OÜ Oxforell</i> Olesja Puumeister, <i>Elion AS</i> Kerli Soosaar, <i>Dive OÜ</i> Katrin Tamsar, <i>Eesti Energia AS</i>
3. The occupational standard is approved by	Professional Services Council
4. Number of the decision of the Professional Council	18
5. Date of the decision of the Professional Council	11/11/2014
6. The occupational standard is valid until (date)	07.05.2019
7. Occupational standard version number	2
8. Reference to the Classification of Occupations (ISCO 08)	1439 Services managers not elsewhere classified 1219 Business services & administration managers not elsewhere classified
9. Reference to the level in the European Qualifications Framework (EQF)	6
<b>C.2 Title of occupational qualification in foreign languages</b>	
In English: Customer service manager	