

PCEF guidance notes
**Area C – Strategy
and innovation**

Area C – Strategy and innovation

Unit PC4 – Monitor and maintain the quality of service to clients and develop and implement new products and services

This unit is about providing quality service to the organisation's clients. It expects you to play a role in identifying changes that can be made to products and services offered, as well as being involved in implementing and monitoring customer service standards and the quality of the services that are provided.

Element reference	Demonstrated behaviour and examples
Element SI1 Identify and implement changes to products and services Click here to view examples	<ul style="list-style-type: none">• Monitor the organisation's products and services with a view to improving them• Evaluate the on-going value and applicability of existing products and services• Generate/evaluate ideas for new products or services or amend existing products or services• Seek feedback on existing products or services from users, clients and other stakeholders• Implement changes to existing products or services or introduce new ones
Element SI2 Monitor and maintain the quality of service to clients. Implement and monitor client service standards and policies Click here to view examples	<ul style="list-style-type: none">• Take existing service standards, including newly defined ones, and translate them into practical action• Explain the nature and purpose of the client service standards and policy clearly to clients colleagues and service providers• Provide staff training• Inform staff and service providers of customer service standards• Monitor service delivery against the implemented customer service standards
Element SI3 Promote continuous quality improvement in products, services and processes Click here to view examples	<ul style="list-style-type: none">• Seek feedback from clients, colleagues and other stakeholders on the quality of service provided by the organisation• Compare the quality of service to that offered by similar organisations and/or industry standards• Constantly promote the quality of the organisation's products, services and processes• Monitor the level of client complaints and ensuring that appropriate action is taken• Monitor new ideas, technologies and practices for their ability to improve the organisation's products and services

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Element SI1 – Identify and implement changes to products and services

EXAMPLE 1

Over the last couple of years there have been a number of new accounting software options that seemed to be better than the one we currently use at the firm. During one of our team meetings I raised the question to the partners and they asked me to make a comparison between the different options, their costs and applicability. I created a detailed spreadsheet with all of the required factors, together with an analysis of the issues that we were facing with our current software. I presented my findings to the partners and recommended one of the software options. After they reviewed my work, they agreed with me and we decided to implement a new accounting package, which was more efficient and more user friendly than the old one.

EXAMPLE 2

The firm undertakes an annual feedback survey with all clients and these results are collated to provide feedback to all portfolio holders. Once I have received my feedback I am required to review this and undertake steps to identify any potential issues. A long term travel agent client had stated they felt the level of service and direct manager contact had reduced in the last year. Therefore I arranged a meeting with the client to discuss the matter with them and ascertain how the level of service could be improved.

EXAMPLE 3

Following a number of customer complaints which had been brought to management's attention regarding the after sales service, I decided to investigate the issue by setting up a customer feedback survey over a discrete period of three months in which I would collate the responses and determine whether corrective action to the process was required. Following this review the results seemed to indicate a breakdown in the process across three specific locations (possibly caused by high staff turnover within the previous two quarters) therefore a plan of action for these affected areas was drafted and recommendations were put forward to management.

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Element SI2 – Monitor and maintain the quality of service to clients. Implement and monitor service standards and policies

EXAMPLE 1

In our practice we have a set of KPIs with regards to service standards and client satisfaction that are monitored on a regular basis. When I looked into the standard policy I noticed that the latest client satisfaction survey was outstanding. I took the initiative to update the service standard policy and discussed this with the partner. I implemented a number of changes with regards to the service reports and client contact deadlines and then sent out the new client satisfaction survey. I then set up a team meeting to discuss both the changes and results.

EXAMPLE 2

Following each audit we obtain feedback from the client. One of my clients is a large restaurant chain and the finance director had received feedback from his accounts team that the junior audit staff didn't always appear clear as to whom questions should be directed and did not appear confident in asking questions. I spoke to other managers at the firm and it became apparent that this was a common theme with other clients and junior staff. Therefore I liaised with our Learning and Development department to determine if an appropriate course could be run internally for all junior staff within my department. We designed the course which involved lots of role plays and I was a facilitator on the course. The outcome is that all junior staff have become more confident when interacting with clients.

EXAMPLE 3

As a well-known player in the technology market it is imperative that the customer standards charter to which we adhere is actively demonstrated by all sales staff, both customer-facing and those based in the after sales call centre. Following my review of recent customer satisfaction survey results, additional staff training was provided to both sets of staff across the three locations in terms of both enhancing their technical capabilities, to increase the quality of service received by customers in the event of malfunction or breakdown of equipment, as well as reiterating the after sales service approach and guidelines.

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Element SI3 – Promote continuous quality improvement in products, services and processes

EXAMPLE 1

In response to the latest client feedback survey I noticed that we started receiving a number of comments from our audit clients saying that although they are very happy with the way the audits were managed, they would appreciate it if we could keep more continuity with regards to the junior audit staff. After investigating reasons behind this it became apparent that as well as being cost driven, it also provided these junior staff members with the opportunity to work on various audits and widen their knowledge and interaction with different clients.

I drafted a response letter to each client to thank them for their comments and also provided them with assurance that whenever possible we will keep the same staff members on their engagements. I did, however, stress the point that we invest in the development of our staff by giving them varied work experience, and we will continue using new junior staff members where practical. I advised the clients that more detailed pre-audit meetings will be held with new junior members in order to ensure that their client knowledge is up to date and they are provided with sufficient level of coaching throughout the audits.

EXAMPLE 2

The firm has been unhappy with its new paperless audit software and in order to undertake a review of alternatives or potential improvements to the current software a task force was set up. The members of the task force were selected from all audit groups and I was asked to represent my department which enabled me to feedback issues identified by my colleagues. The group met with potential software providers to set out our needs and requirements as well as our current providers to determine whether improvements could be made. As a group we conducted a detailed analysis of each software package and determined which package met the needs of the firm. The new package selected which addressed previous issues was then tested by my department on a sample of audit clients before being rolled out across the organisation. The outcome of the testing was successful and the firm then started the process of rolling out the new software for all audits.

EXAMPLE 3

In order to benchmark our new after-sales service I decided to carry out some personal market research by contacting some of our main competitors with 'issues' following product purchase to find out how comprehensive a service they offered and how knowledgeable their after-sales service team was on a range of issues. I was impressed with the result and knew that our corrective action was certainly the right course of action to take in order for us to remain competitive.

A further customer feedback survey was conducted, six months after the initial survey, and it was pleasing to note the higher scores across all but two areas of feedback given. These two specific areas are now being addressed as a matter of priority.