

PCER GUIDANCE NOTES

Strategy and innovation

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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 9 Identify and implement changes to products and services	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 10 Monitor and maintain the quality of service to clients. Implement and monitor client service standards and policies	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 11 Promote continuous quality improvement in products, services and processes	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

Please click [here](#) to see an example of confirmation statements relating to strategy and innovation.

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EXAMPLE 1

As a senior manager it was important to ensure the firm was staying abreast of the latest technologies, this was especially important when the government announced Making Tax Digital (MTD). It was important that the firm was able to offer a solution to our clients to ensure that they remained compliant. I was tasked with finding a software partner we could introduce in the firm and recommend to clients. As part of my research, I looked at the cost involved to the firm, and the cost that would then be passed onto the client, ultimately my recommendation was Xero and the partner agreed and we implanted this in the firm, and we started recommending it to clients. I was able to negotiate with the provider to get a better price which meant that the savings would also be passed onto the clients.

I was responsible for going through the annual feedback surveys that the firm sends out and noticed that there was a common theme that our clients whilst mostly happy with our services, did have a concern about different departments asking for the same information, I raised this with the partners and they agreed that I could make a standardised internal checklist that would be completed and kept with the client information to ensure that departments were not asking for the same information from the clients, on the next feedback surveys we found this issue had resolved.

EXAMPLE 2

As part of my role as senior accountant it was one of my objectives to ensure that we continued to evolve as a firm and offer the best services to our clients.

- During Covid-19, I was charged with finding the best client portal that would suit the needs of the firm and our clients as we could no longer attend client premises and they could no longer come to our offices.
- I collated quotes and attended virtual demos from different software providers, I then presented this information to the senior management team with my recommendation on the best option for our firm and clients.
- The software was approved and an implementation date set. I ensured this was at the weekend to avoid as much disruption to staff as possible.
- I created training documents, one for internal staff which I shared and presented and one for our clients.
- During staff training I stressed the importance of our new customer service standard of only sharing documents through the customer portal and not sharing these via standard email.
- A welcome pack was sent to the clients which included the training document and an invitation to virtual meetings to talk them through the new process.
- I requested feedback from clients and staff after the launch. Whilst there was some negative feedback at first due to teething issues, these were addressed and now the feedback is positive.