

The Standard

CUSTOMER
SERVICE
EXCELLENCE



CSE



®

Version 2.0

The UK Cabinet Office originally developed the
Customer Service Excellence Standard.
It is now independently governed by Assessment Services Ltd
under the Certification Mark Framework

**ELEMENT BY ELEMENT
GUIDANCE
FOR CUSTOMERS – MAY 2026**

Purpose of the Customer Service Excellence Standard

The Customer Service Excellence Standard V2 (CSE Standard) sets higher expectations for customer service by introducing advanced principles applicable across all sectors.

The Standard helps organisations and staff prioritise customers, leading to improved satisfaction, loyalty, and morale. Its flexibility makes it suitable for public, commercial, and third-sector organisations seeking excellent customer service.

Customer Service Excellence Assessments

The Standard promotes best practices and enables your organisation to demonstrate the effectiveness of its customer service strategy.

Outcome Assessments enable your organisation to demonstrate how its actions, policies, and procedures affect customers and to highlight achievements and results. Consistent data collection supports performance comparisons and helps Assessors identify strengths and areas for improvement.

What Outcomes Are Relevant for Customer Services?

Your Assessor will collaborate with your organisation to plan an assessment that best enables you to demonstrate how you meet each Element's requirements. You will gather and share two main types of evidence:

- Hard evidence includes measurable data such as numbers, percentages, or ratios. This type of evidence is straightforward and easily compared.
- Soft evidence consists of qualitative insights such as feedback, opinions, or case studies. This evidence adds context and explains outcomes.

Both types of evidence are important and, together, provide a comprehensive view of your customer service impact. Outcome evidence should be collected strategically, with frequency and methods determined by the intended purpose. For example, some data may be collected continuously or at each point of service delivery.

Some measures may only need to be collected annually.

In addition to core outcomes, your organisation can track results aligned with specific goals in its Customer Service Development Plan. For example, you might assess the impact of new policies, changes to record-keeping, or updated internal processes. These customised measures demonstrate organisational progress.

Assessment Outcomes / Compliance Levels

This guidance supports Assessors in making consistent, evidence-based judgements for each Element, ranging from Non-Compliance to Compliance Plus. Each Element will be assessed to determine which of the four compliance areas it meets.

- **Non-Compliance:** The evidence presented by the Organisation, its staff, customers, partners, and stakeholders confirm that the requirements of this Element have not been addressed.
- **Partial Compliance:** The evidence presented by the Organisation, its staff, customers, partners, and stakeholders confirm that the requirements described within the Element are being applied inconsistently or have not yet been in place for a sufficient time to verify that they are embedded and effective, and, as a result, require significant improvement.
- **Compliance:** The evidence presented by the Organisation, its staff, customers, partners, and stakeholders confirm that the requirements described within the Element are being applied consistently and have been embedded in behaviours and practices. There are minimal areas for further development.
- **Compliance Plus:** Evidence provided by the Organisation—including input from its staff, customers, partners, and stakeholders—demonstrates that the Elements requirements are thoroughly integrated and are implemented with consistent creativity and innovation. These practices are widely regarded as outstanding or exemplary, especially when compared with organisations of similar size and in the same sector.

To achieve the **Customer Service Excellence Standard V2**, a maximum of **eight** elements across the Criterion (as shown below) may be assessed as **Partial Compliance**. If one or more elements are assessed as **Non-Compliance**, the Standard is not achieved.

Customer Service Excellence Standard Criterion	Number of Allowed Partial Compliance Elements Per Criterion
Criterion 1: Customer Insight	2
Criterion 2: Organisational Culture	2
Criterion 3: Information & Access	2
Criterion 4: Service Delivery	1
Criterion 5: Connecting with Customers	1

Element Guidance

The following guidance aims to ensure consistency and reliability across assessments.

Potential **MEASURABLE CHARACTERISTICS** for each Element are provided for the four compliance outcomes described above. These **Measurable Characteristics** are illustrative examples of how performance could be evidenced. However, if, for example, your organisation does not use Net Promoter Score (NPS) but has other robust satisfaction measures in place, it can still meet the Element's requirements.

PRACTICE INSIGHTS demonstrate what your organisation **might** have in place, the actions it **may** have taken, and the policies and procedures it **may** utilise to support the requirements of the Element.

Each organisation seeking Customer Service Excellence certification is unique, so it will pursue the Standard and set key measures that reflect its individuality.

Criterion 1. Customer Insight

1.1 Customer Identification

Element 1.1.1 Understanding Customers: We can demonstrate a comprehensive understanding of the characteristics, needs, and preferences of our current and potential customer groups based on recent, reliable data.

Why: Understanding customer characteristics, needs, and preferences is paramount. Organisations must focus on a personalised service and leveraging data to enhance customer experiences. By demonstrating a comprehensive understanding of current and potential customer groups, organisations can effectively meet and exceed customer expectations, thereby maintaining a competitive edge.

Insights into What This Might Mean in Practice for Your Organisation

- Conduct competitive benchmarking to identify gaps and strengths in customer understanding.
- Conduct training workshops for staff on understanding customer needs.
- Establish processes for updating customer data to keep pace with changing needs and preferences.
- Hold customer focus groups twice a year, to better understand their experiences and expectations.
- Implement data analysis tools and software to interpret the collected data, ensuring insights are actionable.
- Promote interdepartmental collaboration to better understand customer needs.
- Review monthly analytics to quickly adjust customer strategies as trends emerge.
- Segment customers into groups by age, preferences, behaviour, demographics, and needs.
- Track each category's average customer journey time and optimise as needed.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Retention ≥ 90% retention with documented improvement plans.	89% to 70% stable year-on-year.	69% to 60% indicating stagnation.	≤ 59%, declining trend.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Understanding Customers ≥ 90% verified analytics and improvement outcomes.	89% to 65% of records of engagement and use in decision-making.	64% to 50% some data outdated or unused.	≤ 49% Lack of data or evidence of use.

Element 1.1.2

Inclusive Service: We actively review and address the needs of individuals who may have difficulties accessing our services, ensuring we meet their specific requirements.

Why: In contemporary customer service, there is a strong emphasis on inclusivity and accessibility. Actively reviewing and addressing the needs of individuals who may have difficulty accessing services is crucial to ensuring that all customers feel valued and supported. This commitment enhances the overall customer experience and demonstrates a proactive approach to meeting diverse customer needs.

Insights into What This Might Mean in Practice

- Conduct access audits to identify barriers faced by people with physical disabilities, sensory impairments, language differences, or digital exclusion.
- Engage proactively with underrepresented or hard-to-reach groups to understand barriers and co-design solutions.
- Ensure all written communications are available in accessible formats (e.g. large print, Easy Read, alternative languages) on request.
- Maintain up-to-date records of reasonable adjustments for service users and communicate across the team.
- Offer multiple channels for accessing services (in person, by telephone, online, or in writing) to accommodate diverse needs and preferences.
- Partner with community organisations or advocacy groups to reach individuals who may be less likely to self-refer or to access services.
- Regularly train staff in inclusive practice and in awareness of protected characteristics under the Equality Act 2010.
- Review feedback and complaints data to identify patterns of access difficulties for specific groups.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Service Utilisation ≥ 80% optimal utilisation, balanced resources, continuous monitoring.	79% to 70% minor imbalance.	69% to 60% some inefficiency.	≤ 59% consistent overcapacity.
Understanding Customers ≥ 90% verified analytics and improvement outcomes.	89% to 65% of records of engagement and use in decision-making.	64% to 50% some data outdated or unused.	≤ 49% Lack of data or evidence of use.

1.2 Customer Identification

Element 1.2.1 Strategic Engagement: We take a clear, strategic approach to engaging customers, involving them through tailored methods that address the specific needs of identified customer groups.

Why: Tailoring methods to meet the specific needs of identified customer groups ensures that services are relevant and practical, fostering stronger relationships and loyalty. This level of customer involvement enhances satisfaction and drives innovation as organisations receive valuable feedback directly from their customers.

Insights into What This Might Mean in Practice

- Define levels of customer participation, from consultation to co-design and scrutiny, within your framework for involvement.
- Document a Customer Engagement Strategy, setting clear objectives, identifying target groups, and defining methods and timescales.
- Enhance capacity among active customers by providing training, support, and reimbursement for reasonable expenses to remove barriers to participation.
- Ensure all engagement is meaningful and linked to decisions. Show customers how their input influences outcomes (“you said, we did”).
- Regularly review engagement methods and use customer feedback to refine and improve them.
- Segment your customers (e.g., by tenure, age, vulnerability, or geography) and tailor engagement to each group’s needs and preferences.
- Track and report engagement. Identify who you reach and who you miss to spot gaps and improve inclusivity.
- Use surveys, focus groups, digital platforms, events, and panels to broaden reach and gain valuable insights.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Understanding Customers ≥ 90% verified analytics and improvement outcomes.	89% to 65% of records of engagement and use in decision-making.	64% to 50% some data outdated or unused.	≤ 49% Lack of data or evidence of use.

Element 1.2.2 Consultation: We actively consult with customers to enhance our services, ensuring they receive timely updates on outcomes and actions taken in response to their valuable feedback.

Why: Consulting customers is increasingly recognised as vital for service improvement and customer satisfaction. By actively consulting with customers and keeping them updated on actions taken in response to their feedback, organisations can build trust and loyalty. It demonstrates to customers that their opinions are valued, which can lead to enhanced services and a more positive customer experience.

Insights into What This Might Mean in Practice

- Create a clear consultation process with steps for planning, informing, collecting feedback, analysing responses, and updating customers.
- Distinguish between tokenistic and genuine consultation by ensuring customer input is sought before decisions are finalised, not after they are.
- Involve customers in evaluating the quality of the consultation process and use their feedback to continually improve your engagement.
- Maintain a consultation log that records each exercise, the number and profile of respondents, the key themes raised, and the decisions made.
- Monitor response rates and respondent diversity to identify underrepresented groups and adjust accordingly.
- Publish regular “you said, we did” updates to demonstrate that consultation results in tangible change.
- Set realistic yet prompt timescales for closing the feedback loop — customers should receive a clear update on what was heard, what action will or won’t be taken, and the reasons for it.
- Use a range of consultation methods to ensure all customer groups have a meaningful opportunity to contribute.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Actional Feedback ≥ 80% of customer feedback is actioned.	79% to 60% of customer feedback is actioned.	59% to 40% of customer feedback is actioned.	≤ 39% of customer feedback is actioned.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Digital Engagement ≥ 90% customer satisfaction rate achieved.	89% to 75% customer satisfaction rate achieved.	74% to 50% customer satisfaction rate achieved.	≤ 49% customer satisfaction rate achieved.

Element 1.2.3 Regular Review: We regularly evaluate our customer engagement strategies to ensure that the methods employed are effective and produce reliable and representative outcomes.

Why: The emphasis on regularly evaluating customer engagement strategies demonstrates a commitment to continuous improvement, which is essential in today's dynamic market. By ensuring methods are effective and yield reliable outcomes, organisations can adapt to changing customer needs and preferences.

Insights into What This Might Mean in Practice

- Assess effectiveness using quantitative data and qualitative feedback.
- Check whether engagement outcomes reflect the customer base by comparing respondent profiles.
- Compare engagement performance with past years or with similar organisations to identify opportunities for improvement.
- Formally document the review results and update the engagement strategy to include specific actions, responsible parties, and deadlines.
- Involve customers directly in the review process by asking them to assess the quality, accessibility, and usefulness of engagement activities.
- Report outcomes to senior leadership and governance boards to ensure accountability and strategic oversight of customer engagement.
- Review your customer engagement strategy annually to ensure that methods suit current customer needs.
- Test new or emerging engagement methods on a pilot basis to evaluate their effectiveness before rolling them out.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Communications ≥ 98% of customers confirm that the information met their needs.	97% to 75% of customers confirm that the information met their needs.	74% to 50% of customers confirm that the information met their needs.	≤ 49% of customers confirm that the information met their needs.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Inquiry Response Times ≥ 95% of inquiries responded to within SLA; 24-hour average.	94% to 80% compliance, mostly on-time responses.	79% to 60%, inconsistent tracking.	≤ 59%, frequent delays.
Response Rates to Surveys ≥ 50% response rate, feedback analysis fully integrated into improvement cycles.	49% to 35%, regular collection, active use of insights.	34% to 25%, occasional surveys, partial analysis.	≤ 24%, low engagement or unclear distribution.

1.3 Measuring Customer Satisfaction

Element 1.3.1 Customer Satisfaction Targets: We have established ambitious yet achievable key performance indicators to measure customer satisfaction in our key service areas and have communicated them to our staff, customers, and stakeholders.

Why: Having customer satisfaction targets enables organisations to assess their service quality and identify areas for improvement. This process not only drives accountability but also ensures that customer needs are met effectively, ultimately leading to increased customer loyalty and satisfaction.

Insights into What This Might Mean in Practice

- Communicate key performance indicators to customers clearly, avoiding jargon and technical terms.
- Ensure key performance indicators cover all key service areas to measure satisfaction comprehensively not selectively.
- Focus on setting clear, ambitious, and achievable targets, and communicate them effectively to staff, customers, and stakeholders.
- Inform staff of satisfaction targets, outline their responsibilities, and integrate key performance indicators into performance frameworks.
- Involve customers in setting satisfaction targets to ensure they reflect what matters most to them.
- Regularly assess targets to keep them ambitious yet achievable, and update them as service, customer needs, or sector standards evolve.
- Set SMART customer-satisfaction key performance indicators based on historical data and industry benchmarks.
- Set targets that link key satisfaction performance indicators to service improvement plans, so poor results prompt immediate action.
- Share performance regularly with stakeholders: boards, funders, and partners.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Net Promoter Score ≥ 60, strong promoter growth, consistent improvement	NPS 59 to 40, steady trend.	NPS 39 to 20, mixed sentiment.	NPS 19 to 0, minimal insights.
Service Standards ≥ 90% of published standards and met and regularly reviewed.	89% to 80%, strong adherence and updates.	79% to 70%, partial compliance.	≤ 69%, outdated standards & KPIs.

Element 1.3.2 Customer Satisfaction Feedback: We have identified and implemented effective customer feedback methods that prioritise our key service areas and include mechanisms for real-time feedback.

Why: By prioritising key service areas and incorporating real-time feedback, organisations can make informed decisions that directly enhance customer satisfaction. This responsiveness not only fosters customer loyalty but also creates a culture of continuous improvement. As a result, organisations are better positioned to adapt to changing market demands.

Insights into What This Might Mean in Practice

- Identify key service areas and set up dedicated feedback channels for each, rather than using a single general-purpose survey.
- Provide feedback options for all customers, including non-digital methods for those without online access.
- Regularly share feedback with customers, staff, and boards to demonstrate its use in improving service.
- Review feedback by service, location, contractor, or staff to identify underperformance, rather than relying solely on overall satisfaction scores.
- Review response rates by service area and customer group to identify gaps in feedback coverage and adjust as needed.
- Set up a process to respond to real-time feedback and escalate dissatisfied customers to ensure prompt issue resolution.
- Set up a streamlined process to respond to real-time feedback and escalate customer complaints to ensure prompt resolution.
- Test new feedback methods and measure their impact on reach, response quality, and actionability before adoption.
- Use real-time feedback tools to quickly collect customer feedback after each transaction.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Digital Engagement ≥ 90% customer satisfaction rate achieved.	89% to 75% customer satisfaction rate achieved.	74% to 50% customer satisfaction rate achieved.	≤ 49% customer satisfaction rate achieved.
Net Promoter Score ≥ 60, strong promoter growth, consistent improvement	NPS 59 to 40, steady trend.	NPS 39 to 20, mixed sentiment.	NPS 19 to 0, minimal insights.
On-Time Service Delivery ≥ 97% on-time, proactive delay management.	96% to 90% on-time, minimal delays.	89%, to 80% inconsistently tracked.	≤ 79%, frequent delays, reactive communications.
Response Rates to Surveys ≥ 50% response rate, feedback analysis fully integrated into improvement cycles.	49% to 35%, regular collection, active use of insights.	34% to 25%, occasional surveys, partial analysis.	≤ 24%, low engagement or unclear distribution.

Element 1.3.3 Customer Satisfaction Measures: We employ reliable methods to measure our key customer satisfaction performance indicators across a diverse range of customer groups, the results of which are systematically analysed and optimised, where appropriate, with stretch targets and communicated to staff, customers, and stakeholders.

Why: It emphasises the need for reliable methods to measure customer satisfaction, which is crucial for understanding and improving service quality and for providing insights into customer experiences and expectations. This information enables organisations to make informed improvements to their services and targets while sharing results to ensure service improvements align with current best practices, where data-driven decision-making is paramount.

Insights into What This Might Mean in Practice

- Analyse satisfaction data, including regular reports, trend tracking, and root-cause analysis when below target.
- Ensure survey data is robust and comparable by using adequate sample sizes, appropriate sampling methods, and consistent questions.
- Inform frontline staff about satisfaction results in their area so they see how their work affects overall performance.
- Present satisfaction results to customers using infographics, clear language, or short videos.
- Regularly share satisfaction results with leadership, highlighting trends, exceptions, and corrective actions.
- Review response rates, sample representativeness, and survey design to ensure data validity.
- Segment satisfaction by group (age, ethnicity, disability, tenure, geography) to identify gaps in satisfaction.
- Set ambitious stretch targets using benchmarking data from similar organisations or sector datasets.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Actional Feedback ≥ 80% of customer feedback is actioned.	79% to 60% of customer feedback is actioned.	59% to 40% of customer feedback is actioned.	≤ 39% of customer feedback is actioned.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Industry Benchmarks Regular benchmarking, high ranking, proactive learning actions.	Annual benchmarking, clear comparative data.	Occasional benchmarking, limited follow-up.	Rare or outdated comparisons.
Inquiry Response Times ≥ 95% of inquiries responded to within SLA; 24-hour average.	94% to 80% compliance, mostly on-time responses.	79% to 60%, inconsistent tracking.	≤ 59%, frequent delays.
Net Promoter Score ≥ 60, strong promoter growth, consistent improvement	NPS 59 to 40, steady trend.	NPS 39 to 20, mixed sentiment.	NPS 19 to 0, minimal insights.
Repeat Customers ≥ 80% repeat rate, growing trend, loyalty initiatives.	79% to 70%, stable trend.	69% to 60%, variable trend.	≤ 59%, inconsistent monitoring.

Criterion 2. Organisational Culture

2.1 Leadership & Commitment

Element 2.1.1 Commitment to Customer-Centric Service: We prioritise providing a service centred on our customers, as demonstrated by the actions of our leaders and managers and enhanced through technology and innovation.

Why: A steadfast commitment to placing customers at the heart of service delivery is crucial. Customers expect quality service, personalised experiences, and responsiveness. This approach, as demonstrated by leaders' and managers' actions and behaviours, is essential for fostering customer loyalty and satisfaction.

Insights into What This Might Mean in Practice

- Foster continuous improvement by setting up formal channels for staff ideas, with leadership acting on feedback.
- Frequently assess digital tools with customer input during system tests and evaluations.
- Improve customer experience through self-service portals, automated updates, and digital communication.
- Leadership and boards regularly review customer feedback and data to shape strategy and resource allocation.
- Make customer-centricity part of performance reviews, team goals, and senior accountability.
- Publish a clear customer promise to set expectations and ensure leaders are accountable.
- Senior leaders foster customer-focused values by attending events, handling major complaints directly, and factoring customer outcomes into decisions.
- Share internal examples of customer-focused innovation to highlight best practices, reinforce values, and encourage improvement.
- Use data to monitor the impact of technology and services on customer satisfaction and verify if goals are met.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Actional Feedback ≥ 80% of customer feedback is actioned.	79% to 60% of customer feedback is actioned.	59% to 40% of customer feedback is actioned.	≤ 39% of customer feedback is actioned.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Leadership, Policy, Culture 100% of leaders visibly champions customer excellence.	99% to 90% of leaders consistently promote a customer focus culture.	89% to 80% of leader's commitment evident but inconsistent	Limited visible leadership advocacy or outdated policies.

Element 2.1.2 Policy and Procedure Alignment: Our policies and procedures are designed to foster a customer service culture that aligns with corporate commitments and insights, using, where appropriate, artificial intelligence and data analytics to enhance experiences while prioritising personalisation and proactive engagement.

Why: It underscores the necessity of a customer service culture that aligns with corporate commitments and customer insights. Integrating technologies such as artificial intelligence (AI) and data analytics is pivotal to enhancing customer experiences, and the emphasis on personalisation and proactive engagement aligns with current customer expectations.

Insights into What This Might Mean in Practice

- Align each policy with its stage in the customer journey and flag any inconsistencies from the customer's perspective.
- Align training with policy content to ensure staff understand the customer-centric values underpinning procedures.
- Develop a CRM that enables staff to customise interactions for each customer based on their history, preferences, and needs.
- Ensure that the use of AI in customer interactions remains transparent, ethical, and accessible.
- Regularly review customer policies to ensure they align with company standards and regulations.
- Review public policies for clarity and accessibility, using customer feedback and satisfaction data to refine procedures.
- Set up automated alerts for milestones, such as tenancy reviews and repairs, to keep customers updated.
- Use AI and data analytics where they add value, such as using predictive tools to identify customers who may disengage or be vulnerable.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Leadership, Policy, Culture 100% of leaders visibly champions customer excellence.	99% to 90% of leaders consistently promote a customer focus culture.	89% to 80% of leader's commitment evident but inconsistent	Limited visible leadership advocacy or outdated policies.

Element 2.1.3 Privacy Protection: We prioritise customer privacy during face-to-face interactions and strictly protect customer data throughout its transfer, storage, and usage processes.

Why: Customer privacy is paramount; prioritising it during interactions and ensuring robust data protection throughout its lifecycle is essential. This focus builds customer trust when it aligns with industry regulatory requirements and best practices.

Insights into What This Might Mean in Practice

- All staff regularly complete mandatory training in GDPR principles, lawful processing, and data handling.
- Audit access controls regularly to ensure staff have only the data necessary for their roles, and update permissions when roles change.
- Complete Privacy Impact Assessments for any new service, system, or process that collects or processes customer data.
- Implement a data retention schedule that defines retention for each data category, with automated or audited deletion.
- Inform customers of their data rights via a clear, plain-English privacy notice.
- Keep a current Record of Processing Activities detailing what data is stored, its purpose, the storage method, and access permissions.
- Maintain a clear Data Protection Policy, review it annually, and communicate it to staff and customers.
- Set up a data breach response with defined escalation procedures, notification deadlines, and staff training to enable prompt reporting.
- Train staff to handle sensitive information discreetly in shared spaces and on home visits.
- Use encrypted email, secure file transfer, and tightly control removable media and personal devices.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Data Breaches No breaches in 12 months, proactive monitoring, full compliance	1 minor breach, resolved effectively, learning documented.	Occasional breaches with reactive approach.	Recurrent issues or delays in reporting.

Element 2.1.4 Empowerment of Staff: Our staff are encouraged to deliver excellent customer service by fostering a customer-centric culture that empowers them and leverages technology and data analytics to enhance customer satisfaction.

Why: A customer-centric culture not only empowers staff to take initiative but also leads to higher job satisfaction and retention, contributing to overall organisational success. In modern contexts, it is also essential to integrate technology and data analytics to enhance customer insights.

Insights into What This Might Mean in Practice

- Clarify empowerment in practice by specifying staff autonomy, decision-making limits, and escalation procedures.
- Consistently empower staff to deliver uniform, high-quality customer service.
- Develop a culture framework comprising values, behaviours, and service standards, and integrate it into induction, training, and performance management processes.
- Engage staff in creating and reviewing service standards to harness frontline insights and identify barriers to quality service.
- Equip frontline staff with the tools, information, and authority to resolve issues at first contact, thereby reducing escalations.
- Provide frequent, real-time coaching and feedback on service performance.
- Recognise staff who exceed customer expectations to foster a customer-focused culture.
- Use technology to reduce the administrative burden on frontline staff, freeing time for meaningful customer interactions.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Digital Engagement ≥ 90% customer satisfaction rate achieved.	89% to 75% customer satisfaction rate achieved.	74% to 50% customer satisfaction rate achieved.	≤ 49% customer satisfaction rate achieved.
Employee Engagement ≥ 80% engagement	79% to 70% engagement, consistent initiatives.	69% to 60%, mixed results or limited participation.	≤ 59%, declining trend / no formal measurement.

2.2 Professionalism & Staff Engagement

Element 2.2.1 Recruitment & Training: Our recruitment, induction, training, and development practices reflect a strong commitment to customer service, ensuring that all staff are equipped to meet customer needs effectively.

Why: The emphasis on recruitment, induction, training, and development practices underscores a strong commitment to ensuring that all staff are well-prepared to meet customer needs effectively. As customer expectations continually evolve, such a foundation is vital for fostering a culture of service excellence.

Insights into What This Might Mean in Practice

- Develop a CPD programme covering refresher training, policy updates, and advanced customer service skills.
- Develop a structured induction programme to introduce new staff to customer service standards, culture, and expectations.
- Ensure training is accessible to all staff, including part-time, remote, and frontline staff.
- Include customer service performance in appraisals, with regular, constructive feedback on interactions.
- Include customer service values and competencies in job descriptions, person specifications, and interview frameworks.
- Incorporate customer experience into induction, for example, through shadowing, reviewing feedback, or engagement activities.
- Map training needs to customer service outcomes to identify gaps affecting interaction quality.
- Provide targeted training tailored to each service area and customer group.
- Track the impact of training on satisfaction outcomes by using data to evaluate measurable improvements.
- Use values-based recruitment methods, such as scenario-based questions and situational judgement tests, to assess customer service orientation and technical skills.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Individual / Team Performance Evaluations All staff goals aligned with service excellence, and evidence of improvement.	99% to 80% reviewed, moderate Evidence of follow-up.	79% to 60%, some inconsistencies or lack	≤ 59%, ad-hoc reviews, limited linkage to service standards.
Staff Turnover 0% to 6% turnover, consistent improvement, robust retention strategy. retention strategy.	7% to 10% turnover, stable trend.	11% to 14%, moderate turnover, partial strategy.	≤ 15%, high churn, limited action.

Element 2.2.2 Staff Professionalism: Our staff embody professionalism and courtesy, interacting with customers to comprehend their needs and improve service delivery across all communication channels.

Why: Professionalism and politeness are vital for an organisation as they enhance customer satisfaction and loyalty. When staff engage respectfully and effectively with customers, it builds trust and encourages repeat business. Additionally, such interactions enhance the organisation's reputation

Insights into What This Might Mean in Practice

- Acknowledge and reward professionalism by highlighting real cases that demonstrate valued behaviours.
- Create guidelines for each contact channel specifying tone, response time, language use, and escalation.
- Maintain consistent professional standards across all teams, sites, contractors, and partners.
- Outline professionalism and courtesy within service standards, with clear examples of expected behaviour for telephone, email, face-to-face, live chat, and social media channels.
- Provide staff training in de-escalation, empathy, and handling difficult customer interactions.
- Record and analyse staff insights into customer needs to inform service improvement.
- Regularly update communication standards to reflect evolving customer needs, channels, and best practices.
- Regularly use customer feedback, including compliments, complaints, and survey responses, to inform team learning in meetings and supervision.
- Train staff to use active listening and needs-based questions to identify customer needs before resolving issues.
- Use call monitoring, email audits, and mystery shopping to assess the quality and consistency of interactions.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Individual / Team Performance Evaluations All staff goals aligned with service excellence, and evidence of improvement.	99% to 80% reviewed, moderate Evidence of follow-up.	79% to 60%, some inconsistencies or lack	≤ 59%, ad-hoc reviews, limited linkage to service standards.
Repeat Customers ≥ 80% repeat rate, growing trend, loyalty initiatives.	79% to 70%, stable trend.	69% to 60%, variable trend.	≤ 59%, inconsistent monitoring.
Service-Related Complaints ≥ 95% resolution, low recurrence, lessons clearly implemented.	94% to 80% resolution, actions documented.	79% to 70%, follow-up inconsistent.	≤ 69%, unresolved or repeat issues.
Staff Turnover 0% to 6% turnover, consistent improvement, robust retention strategy.	7% to 10% turnover, stable trend.	11% to 14%, moderate turnover, partial strategy.	≤ 15%, high churn, limited action.
Understanding Customers ≥ 90% verified analytics and improvement outcomes.	89% to 65% of records of engagement and use in decision-making.	64% to 50% some data outdated or unused.	≤ 49% Lack of data or evidence of use.

Element 2.2.3 Customer Focus at All Levels: Customer focus, including a commitment to digital engagement and personalised service, is prioritised throughout the organisation, with mechanisms in place for individual and team performance management and feedback.

Why: By offering personalised service, organisations can address individual needs, foster stronger relationships and encourage repeat business. Furthermore, robust performance management and feedback mechanisms create a culture of continuous improvement, enabling teams to adapt to evolving customer expectations.

Insights into What This Might Mean in Practice

- Add customer-focused skills to all performance frameworks so that accountability for outcomes extends beyond frontline staff.
- Create a digital strategy to enhance customer accessibility, convenience, and personalisation.
- Create CRM tools that enable staff to tailor interactions to customers' history, preferences, communication styles, and vulnerabilities.
- Create digital tools for customers, regularly test usability, and ensure accessibility for users at all skill levels.
- Embed customer focus as a core value, from board strategy through to frontline delivery and back-office functions.
- Highlight real examples of customer focus to reinforce values and drive strong performance.
- Offer digital inclusion support for customers, including skills training, assisted digital services, and non-digital options.
- Review performance management frameworks regularly to ensure customer metrics remain relevant and aligned with service priorities.
- Use staff feedback to address service barriers and inform both operational and strategic decisions.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Actional Feedback ≥ 80% of customer feedback is actioned.	79% to 60% of customer feedback is actioned.	59% to 40% of customer feedback is actioned.	≤ 39% of customer feedback is actioned.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Individual / Team Performance Evaluations All staff goals aligned with service excellence, and evidence of improvement.	99% to 80% reviewed, moderate Evidence of follow-up.	79% to 60%, some inconsistencies or lack	≤ 59%, ad-hoc reviews, limited linkage to service standards.
Service-Related Complaints ≥ 95% resolution, low recurrence, lessons clearly implemented.	94% to 80% resolution, actions documented.	79% to 70%, follow-up inconsistent.	≤ 69%, unresolved or repeat issues.
Understanding Customers ≥ 90% verified analytics and improvement outcomes.	89% to 65% of records of engagement and use in decision-making.	64% to 50% some data outdated or unused.	≤ 49% Lack of data or evidence of use.

Element 2.2.4: Staff Contribution: Our staff understand how they contribute to the customer-centric focus of the organisation and believe that leaders, managers, customers, and stakeholders recognise their efforts.

Why: When staff understand their role in contributing to a customer-centric focus and feel recognised for their efforts, it enhances their engagement and commitment to the organisation. This, in turn, can lead to improved customer service, higher satisfaction rates, and, ultimately, better business outcomes.

Insights into What This Might Mean in Practice

- Create opportunities for staff to hear directly from customers—through focused feedback sessions, customer panels, and similar initiatives.
- Engage staff in shaping customer service values to strengthen their commitment to those standards.
- Establish peer recognition programmes to reward customer-focused actions and to strengthen a service-oriented culture.
- Incorporate customer-focused questions into staff surveys to identify teams or individuals who feel disconnected from the customer mission.
- Leaders consistently recognise staff for customer service through appraisals, reward schemes, and timely informal feedback.
- Share satisfaction results and positive feedback across the organisation to foster staff pride in service outcomes.
- Share stakeholder recognition with teams to reinforce their impact and value.
- Show staff how their work aligns with customer-focused values, even in support roles.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Actional Feedback ≥ 80% of customer feedback is actioned.	79% to 60% of customer feedback is actioned.	59% to 40% of customer feedback is actioned.	≤ 39% of customer feedback is actioned.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Employee Engagement ≥ 80% engagement.	79% to 70% engagement, consistent initiatives.	69% to 60%, mixed results or limited participation.	≤ 59%, declining trend / no formal measurement.

Criterion 3. Information & Access

3.1 Availability & Quality of Information

Element 3.1.1 Service Transparency: We consistently provide comprehensive service information, including contact methods, operational details, personalised service, responsiveness, and all associated service charges (where applicable), tailored to customer needs, ensuring transparent communication and accessibility for all customers.

Why: Providing comprehensive service information is crucial for organisations, as it fosters trust and builds strong customer relationships. By ensuring transparent communication about contact methods, operational details, and associated charges, organisations can manage customer expectations.

Insights into What This Might Mean in Practice

- Consistently review customer-facing materials to ensure accuracy and accessibility, using feedback and complaints to identify areas for improvement and address gaps in service.
- Ensure communication channels are consistent and accurate and establish a simple update process for content changes.
- Provide clear information about services in different formats and languages, adapting it to individual needs.
- Provide service access info, out-of-hours plans, emergency contacts, digital self-service, and a named contact if available.
- Maintain an updated service directory listing services, contacts, hours, response times, and fees. Regularly share standards and performance reports with customers.
- Provide details on all service charges, including calculation methods, coverage, and the customer query process.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Communications ≥98% of customers confirm that the information met their needs.	97% to 75% of customers confirm that the information met their needs.	74% to 50% of customers confirm that the information met their needs.	≤ 49% of customers confirm that the information met their needs.
Customer Enquires ≥ 90% of customer enquiries are resolved within 48 hours.	89% to 70% of customer enquiries are resolved within 48 hours.	69% to 50% of customer enquiries are resolved within 48 hours.	≤ 49% of customer enquiries resolved within 48 hours.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Digital Engagement ≥ 90% customer satisfaction rate achieved.	89% to 75% customer satisfaction rate achieved.	74% to 50% customer satisfaction rate achieved.	≤ 49% customer satisfaction rate achieved.
Service Utilisation ≥ 80% optimal utilisation, balanced resources, continuous monitoring.	79% to 70% minor imbalance.	69% to 60% some inefficiency.	≤ 59% consistent overcapacity.

Element 3.1.2 Customer Information Delivery: We ensure that customer information is delivered through appropriate channels, aligned with customers' needs and preferences.

Why: It underscores the importance of providing tailored information, which is crucial where customers expect personalised experiences. Additionally, the emphasis on diverse, appropriate channels aligns with current trends, as customers prefer to engage across various platforms, making it essential for companies to cater to their needs and preferences.

Insights into What This Might Mean in Practice

- Audit customer channel preferences using surveys, feedback, and CRM data, and log them, ensuring all staff, including contractors, consistently honour them.
- Build a multi-channel communication strategy that specifies which channels to use for each type of information.
- Deliver urgent news and service updates promptly to customers via the fastest, most reliable channels for each customer group.
- Engage customers to identify communication gaps.
- If a customer has been inactive, reach out to confirm whether their preferences or circumstances have changed.
- Monitor open and response rates, as well as customer feedback, to assess channel effectiveness.
- Optimise digital channels for accessibility and mobile use while maintaining non-digital alternatives to ensure no customer is disadvantaged.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Digital Engagement ≥ 90% customer satisfaction rate achieved.	89% to 75% customer satisfaction rate achieved.	74% to 50% customer satisfaction rate achieved.	≤ 49% customer satisfaction rate achieved.
Inquiry Response Times ≥ 95% of inquiries responded to within SLA; 24-hour average.	94% to 80% compliance, mostly on-time responses.	79% to 60%, inconsistent tracking.	≤ 59%, frequent delays.
Understanding Customers ≥ 90% verified analytics and improvement outcomes.	89% to 65% of records of engagement and use in decision-making.	64% to 50% some data outdated or unused.	≤ 49% Lack of data or evidence of use.

Element 3.1.3 Digital Information: We utilise technology, including but not limited to digital access, applications, social media, data-driven insights, and virtual chat systems, to enhance customer engagement and satisfaction.

Why: Leveraging digital tools, data-driven insights, and social media enables organisations to meet evolving customer expectations, provide personalised experiences, and drive overall business growth. Technology, such as online access, applications, social media, and virtual chat systems, allows organisations to connect with customers more effectively and provide timely support.

Insights into What This Might Mean in Practice

- Create a digital engagement plan that uses technologies that meet customer needs and selects tools based on user preferences.
- Ensure digital tools meet the Web Content Accessibility Guidelines (WCAG) requirements.
- Manage social media by sharing updates, responding promptly to queries, and adhering to established protocols for tone and escalation.
- Monitor emerging digital innovations and pilot new approaches systematically before rolling them out more widely.
- Provide digital inclusion support, including signposting to skills training. Maintain non-digital alternatives.
- Regularly review websites and portals for usability, accuracy, and accessibility.
- Use a chatbot to answer routine questions and escalate to a human agent if necessary.
- Use data from digital interactions, such as analytics, chatbot logs, and feedback, to identify trends in customer needs.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Communications ≥98% of customers confirm that the information met their needs.	97% to 75% of customers confirm that the information met their needs.	74% to 50% of customers confirm that the information met their needs.	≤ 49% of customers confirm that the information met their needs.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Digital Engagement ≥ 90% customer satisfaction rate achieved.	89% to 75% customer satisfaction rate achieved.	74% to 50% customer satisfaction rate achieved.	≤ 49% customer satisfaction rate achieved.

Element 3.1.4 Comprehension Assurance: We have implemented systems to ensure that customers receive and understand the information provided, leveraging technology to improve communication and anticipate customer needs.

Why: As customer expectations evolve, clear communication and understanding become even more critical. Customers expect timely, accurate information and personalised interactions. They are increasingly engaging through digital channels, and the effective use of technology can streamline interactions.

Insights into What This Might Mean in Practice

- Analyse repeat-contact data to identify where customers call back for clarification.
- Communicate in plain English, check readability, and offer Easy Read, visual guides, videos, and translations as standard practice.
- Embed anticipatory communication in service delivery by proactively sharing the information customers are likely to need at each stage.
- Gather customer feedback on the clarity and usefulness of communications to identify comprehension barriers and inform improvements.
- Send automated follow-ups via SMS, email, or other channels to clarify information and avoid confusion.
- Train staff to check understanding after each interaction using teach-back, plain language, and chunked information.
- Use the CRM to identify customers who need support and to customise messages to their preferences and reading levels.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Communications ≥98% of customers confirm that the information met their needs.	97% to 75% of customers confirm that the information met their needs.	74% to 50% of customers confirm that the information met their needs.	≤ 49% of customers confirm that the information met their needs.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.

Element 3.1.5 Continuous Quality Improvement: We systematically assess and enhance the quality of all types of our communications, including verbal, published, electronic, and web-based information.

Why: Effective communication is paramount, as customers engage through various channels, including social media, chatbots, and email. Systematically evaluating and improving communication enhances clarity and understanding among team members, leading to better collaboration and fewer errors. Effective communication also reflects professionalism, which can bolster an organisation's reputation.

Insights into What This Might Mean in Practice

- Assess communication quality by seeking external accreditation, organising peer reviews, or conducting mystery shopping to obtain unbiased insights.
- Assign a content owner for each area to regularly review web and electronic communications for accuracy, active links, up-to-date information, and accessibility.
- Develop a framework for communication quality across formats and regularly audit clarity, accuracy, tone, and accessibility using structured tools.
- Evaluate the quality, accuracy, accessibility, and ownership of communication by routinely monitoring calls, sampling emails, and reviewing web content.
- Include questions about clarity, usefulness, and accessibility in customer feedback to assess the quality of communication.
- Maintain a central library of approved templates and letters and review it regularly to ensure customer communications meet quality standards.
- Monitor satisfaction levels, complaints, and first-contact resolution rates to demonstrate the value of effective communication.
- Use audit outcomes to guide improvements through cross-functional reviews that identify training gaps, update content, and streamline processes across service areas.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Actional Feedback ≥ 80% of customer feedback is actioned.	79% to 60% of customer feedback is actioned.	59% to 40% of customer feedback is actioned.	≤ 39% of customer feedback is actioned.
Customer Communications ≥ 98% of customers confirm that the information met their needs.	97% to 75% of customers confirm that the information met their needs.	74% to 50% of customers confirm that the information met their needs.	≤ 49% of customers confirm that the information met their needs.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Understanding Customers ≥ 90% verified analytics and improvement outcomes.	89% to 65% of records of engagement and use in decision-making.	64% to 50% some data outdated or unused.	≤ 49% Lack of data or evidence of use.

3.2 Accessibility of Services and/or Products

Element 3.2.1 Accessibility: We are committed to making our services and products accessible to all customers and promoting inclusivity across diverse demographics.

Why: With an increased emphasis on ensuring that services and products are accessible to all customers, this focus on inclusivity is crucial in creating positive customer experiences and catering to the diverse needs of a broader audience. By promoting accessibility, organisations can create a more equitable environment that enhances customer satisfaction and can broaden their market reach.

Insights into What This Might Mean in Practice

- Ensure physical and digital spaces meet accessibility standards, including step-free access, hearing loops, and WCAG compliance.
- Include accessibility in service design and procurement from the outset, rather than adding it later.
- Monitor accessibility through customer feedback, complaints, and audits, and report findings to leaders and boards.
- Offer key communications in accessible formats, including Easy Read, large print, audio, Braille, and translations.
- Record any accessibility changes in your CRM, and ensure all staff are trained in the Equality Act 2010 and in communicating with diverse customers.
- Review all service touchpoints for accessibility and set clear goals, responsibilities, and annual review schedules in an Action Plan.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Actional Feedback ≥ 80% of customer feedback is actioned.	79% to 60% of customer feedback is actioned.	59% to 40% of customer feedback is actioned.	≤ 39% of customer feedback is actioned.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.

Element 3.2.2 Customer Engagement: We continuously monitor and analyse customer engagement with our services and products to identify opportunities for enhancement and implement necessary improvements.

Why: The focus on continuously monitoring and analysing customer engagement is crucial because it signals a proactive approach to identifying areas for improvement. This aligns with current best practices in customer service, where organisations strive to adapt to evolving customer needs and expectations.

Insights into What This Might Mean in Practice

- Compare engagement with peers to set targets and identify new opportunities.
- Develop a structured process for applying insights, with clear accountability, deadlines, and impact evaluation.
- Identify proposed changes, then run A/B tests and pilot programmes through small trials.
- Invite customers to panels or workshops, review engagement data together, and share experiences to improve interpretation.
- Monitor engagement by tracking metrics, reviewing CRM and analytics data, and responding to trends, low activity, emerging needs, or dissatisfaction.
- Review team and organisational performance, report findings to leadership, and share improvements with customers.
- Segment engagement data by customer group, service area, and channel.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Actional Feedback ≥ 80% of customer feedback is actioned.	79% to 60% of customer feedback is actioned.	59% to 40% of customer feedback is actioned.	≤ 39% of customer feedback is actioned.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Digital Engagement ≥ 90% customer satisfaction rate achieved.	89% to 75% customer satisfaction rate achieved.	74% to 50% customer satisfaction rate achieved.	≤ 49% customer satisfaction rate achieved.

Element 3.2.3 Appropriate Facilities: We provide suitable facilities for customers visiting our premises in person, ensuring their comfort and accessibility needs are met.

Why: Providing suitable facilities for in-person visitors is crucial to ensuring comfort and accessibility, key components of a positive customer experience.

Insights into What This Might Mean in Practice

- Aim to ensure that third-party or shared premises meet the same standards as organisation-owned sites.
- Audit premises for accessibility, safety, signage, privacy, and cleanliness, and promptly report and resolve maintenance issues.
- Clearly display on-site information on available services, contact details, and how to raise concerns or complaints.
- Collect customer feedback via surveys, forms, or focus groups, and use it to improve facilities.
- Ensure reception and waiting areas are welcoming, with adequate seating and clear signage.
- Provide accessible toilets and facilities for those with children or using mobility aids.
- Provide private rooms for customers to discuss sensitive issues, such as financial difficulties or safeguarding concerns.
- Provide reasonable accommodations for customers with disabilities, such as step-free access, hearing loops, and tactile wayfinding, where feasible.
- Strive to ensure the premises reflect the organisation's values and commitment to inclusivity.
-

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Actional Feedback ≥ 80% of customer feedback is actioned.	79% to 60% of customer feedback is actioned.	59% to 40% of customer feedback is actioned.	≤ 39% of customer feedback is actioned.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Digital Engagement ≥ 90% customer satisfaction rate achieved.	89% to 75% customer satisfaction rate achieved.	74% to 50% customer satisfaction rate achieved.	≤ 49% customer satisfaction rate achieved.

3.3 Collaborative Partnerships

Element 3.3.1 Coordinated Services: We leverage technology to partner with stakeholders, providing coordinated services that enhance customer benefits and ensure accountability for quality, creating a seamless experience for all users.

Why: Coordinated services enable organisations to streamline operations, improve service delivery, and enhance customer satisfaction. By partnering with stakeholders and delivering coordinated services, organisations can ensure that they effectively meet customer expectations.

Insights into What This Might Mean in Practice

- Develop a coordinated referral approach that includes warm handovers, shared consent processes, and follow-up protocols.
- Develop a partnership framework to identify partners, define principles and governance, and set SLAs covering quality, communication, response times, and accountability.
- Implement joint performance monitoring using shared key performance indicators and regular reviews.
- Involve customers in evaluating coordinated services and use their feedback to identify where partnership working is falling short.
- Share learning regularly with partners to foster continuous improvement and ensure alignment with shared customer-centric values.
- Use shared technology platforms and a single customer view across all touchpoints.
- Use technology to automate coordination tasks, including referral notifications, scheduling, and real-time updates.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Community Participation 4+ community organisations engage in sustained initiatives.	2 to 3 community organisations engage in sustained initiatives.	1 community organisation engages in sustained initiatives.	No community organisations engage in sustained initiatives.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Stakeholder Satisfaction ≥ 90% satisfaction, regular engagement, actions evidenced.	89% to 80% satisfaction & feedback loop in place.	79% to 70% satisfaction & limited follow-up.	≤ 69% satisfaction & inconsistent consultation.

Element 3.3.2 Communication & Accountability: We have established collaborative partnerships that enhance technology utilisation and incorporate customer feedback, thereby ensuring transparent communication and accountability regarding service quality.

Why: Establishing collaborative partnerships that enhance technology utilisation and incorporate customer feedback is crucial for organisations. This approach promotes transparency and accountability regarding service quality, allowing organisations to adapt to customer needs effectively.

Insights into What This Might Mean in Practice

- Capture and share lessons learned from partnerships to drive continuous improvement in collaborative practice.
- Conduct joint reviews, assess service quality, share data, and make decisions through structured, minuted meetings and regular follow-up.
- Conduct regular partnership health checks to review service quality, the relationship, communication, trust, and shared values.
- Draft a partnership charter outlining transparency, information sharing, accountability, roles, escalation procedures, and remedies for non-compliance.
- Implement feedback systems for partner services and ensure partners collectively review feedback to drive improvements.
- Present performance results to customers via panels to gather feedback and ensure accountability for outcomes.
- Rely on secure messaging, project platforms, and automated alerts.
- Use dashboards and tech tools to monitor performance.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Community Participation 4+ community organisations engage in sustained initiatives.	2 to 3 community organisations engage in sustained initiatives.	1 community organisation engages in sustained initiatives.	No community organisations engage in sustained initiatives.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Service-Related Complaints ≥ 95% resolution, low recurrence, lessons clearly implemented.	94% to 80% resolution, actions documented.	79% to 70%, follow-up inconsistent.	≤ 69%, unresolved or repeat issues.
Stakeholder Satisfaction ≥ 90% satisfaction, regular engagement, actions evidenced.	89% to 80% satisfaction & feedback loop in place.	79% to 70% satisfaction & limited follow-up.	≤ 69% satisfaction & inconsistent consultation.

Element 3.3.3 Community Engagement: We actively engage with the broader community, demonstrating a robust culture and a commitment to corporate social responsibility that enhances our social impact.

Why: Customers value organisations that actively engage with their communities and demonstrate their commitment to corporate social responsibility. This engagement enhances the organisation's social impact and fosters customer loyalty and trust, both of which are crucial to delivering exceptional customer service.

Insights into What This Might Mean in Practice

- Develop a community engagement strategy by identifying core themes, target audiences, and clear impact goals.
- Develop a community investment programme aligned with company values, including volunteering, skill-sharing, environmental action, and local sponsorship to address local needs.
- Engage personnel at all levels of the organisation in community initiatives, such as volunteering programmes.
- Engage underrepresented groups to reach seldom-heard customers and improve access to services.
- Include corporate social responsibility (CSR) and community engagement in governance and reporting, with board oversight as a strategic priority.
- Partner with local organisations to broaden reach, avoid duplication, and leverage community resources.
- Set measurable social impact goals and regularly update customers, staff, and stakeholders.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Actional Feedback ≥ 80% of customer feedback is actioned.	79% to 60% of customer feedback is actioned.	59% to 40% of customer feedback is actioned.	≤ 39% of customer feedback is actioned.
Community Participation 4+ community organisations engage in sustained initiatives.	2 to 3 community organisations engage in sustained initiatives.	1 community organisation engages in sustained initiatives.	No community organisations engage in sustained initiatives.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.

Criterion 4. Service Delivery

4.1 Response Times & Quality Standards

Element 4.1.1 Ambitious Customer Interaction Standards: We aim to meet or ideally exceed our ambitious organisational key performance indicators for customer service, ensuring our goals align with national standards, regulations, and industry benchmarks for timeliness and quality.

Why: It ensures that organisations provide timely responses and high-quality customer service. This not only enhances customer satisfaction and loyalty but also aligns with organisational goals and relevant regulations.

Insights into What This Might Mean in Practice

- Annually review key performance indicators and increase targets to keep pace with improving performance and higher customer expectations.
- Involve customers in setting and evaluating key performance indicators so standards reflect their priorities.
- Performance indicators cover timeliness, quality, first-contact resolution, average handling time, customer effort, and satisfaction.
- Share key performance indicators updates with customers, staff, and boards, noting gaps and corrective actions.
- Share key performance indicators with staff, how they will be measured, and their role in achieving targets.
- Track performance with dashboards and alerts, review results often to spot problems, and assign clear actions with deadlines and responsible individuals.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Inquiry Response Times ≥ 95% of inquiries responded to within SLA; 24-hour average.	94% to 80% compliance, mostly on-time responses.	79% to 60%, inconsistent tracking.	≤ 59%, frequent delays.
Repeat Customers ≥ 80% repeat rate, growing trend, loyalty initiatives.	79% to 70%, stable trend.	69% to 60%, variable trend.	≤ 59%, inconsistent monitoring.
Service Delivery Performance ≥ 90% of targets met - visible trend of improvement.	89% to 80% achieved, consistent tracking.	79% to 70%, moderate improvement efforts.	≤ 69%, unverified metrics.
Service-Related Complaints ≥ 95% resolution, low recurrence, lessons clearly implemented.	94% to 80% resolution, actions documented.	79% to 70%, follow-up inconsistent.	≤ 69%, unresolved or repeat issues.
Service Standards ≥ 90% of published standards and met and regularly reviewed.	89% to 80%, strong adherence and updates.	79% to 70%, partial compliance.	≤ 69%, outdated standards & KPIs.

Element 4.1.2 Stakeholder Engagement: Our customer interaction standards and key performance indicators (KPIs) for timely response and quality customer service are shaped by feedback from relevant stakeholders, ensuring that our approach stays responsive and effective.

Why: It emphasises the importance of formulating performance standards and key performance indicators based on feedback from relevant stakeholders, which is crucial for remaining responsive and effective in a rapidly changing environment. This focus on stakeholder feedback aligns with current best practices in customer service, where adaptability and continuous improvement are key to meeting customer expectations.

Insights into What This Might Mean in Practice

- Assess stakeholder engagement annually to ensure diverse input and useful outcomes.
- Gather stakeholder feedback, revise standards accordingly, and communicate how this input has influenced targets.
- List all stakeholders—customers, staff, contractors, regulators, and funders—and use a calendar to schedule regular feedback sessions on service standards and performance.
- Make customers and frontline staff key stakeholders in setting standards, so their experience informs realistic expectations.
- Report stakeholder engagement and outcomes to senior leadership and boards to oversee external input into standards.
- Set ambitious targets by benchmarking against stakeholders, regulations, sector standards, and customers' goals.
- Use a range of engagement methods tailored to each stakeholder group's preferences and capacity.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Service Standards ≥ 90% of published standards and met and regularly reviewed.	89% to 80%, strong adherence and updates.	79% to 70%, partial compliance.	≤ 69%, outdated standards and KPIs.
Stakeholder Satisfaction ≥ 90% satisfaction, regular engagement, actions evidenced.	89% to 80% satisfaction and feedback loop in place.	79% to 70% satisfaction and limited follow-up.	≤ 69% satisfaction and inconsistent consultation.
Understanding Customers ≥ 90% verified analytics and improvement outcomes.	89% to 65% of records of engagement and use in decision-making.	64% to 50% some data outdated or unused.	≤ 49% Lack of data or evidence of use.

Element 4.1.3 Performance Monitoring and Improvement: We continuously monitor, assess, and publicise our performance against national, regulatory, and industry standards and key performance indicators, including those related to the timeliness and quality of customer service, and when these standards or indicators are not met, we promptly implement the necessary improvement actions.

Why: By consistently monitoring and assessing performance, an organisation can identify areas for improvement, respond promptly to any shortcomings, and make necessary adjustments.

Insights into What This Might Mean in Practice

- Benchmark against sector and national data and assess key metrics to identify opportunities for improvement.
- Regularly report performance to governance boards. Engage customers in groups to pinpoint issues and co-develop solutions.
- Review the monitoring framework annually, track relevant metrics, collect reliable data, and produce timely reports.
- Set clear objectives, assign owners, define timescales, and set measurable criteria—then monitor and report progress.
- Set up tiered responses to shortfalls, ranging from team fixes to formal improvement plans. Analyse root causes and share findings.
- Share performance results in reports, online, and in newsletters. Clearly address issues and outline solutions.
- Use dashboards and automated alerts to monitor key performance indicators in real time, including timeliness, first-contact resolution, response times, complaints, and satisfaction.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Actional Feedback ≥ 80% of customer feedback is actioned.	79% to 60% of customer feedback is actioned.	59% to 40% of customer feedback is actioned.	≤ 39% of customer feedback is actioned.
Customer Retention ≥ 90% retention and documented improvement plans.	89% to 70% stable year-on-year.	69% to 60% indicating stagnation.	≤ 59%, declining trend.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Inquiry Response Times ≥ 95% of inquiries responded to within SLA; 24-hour average.	94% to 80% compliance, mostly on-time responses.	79% to 60%, inconsistent tracking.	≤ 59%, frequent delays.
Repeat Customers ≥ 80% repeat rate, growing trend, loyalty initiatives.	79% to 70%, stable trend.	69% to 60%, variable trend.	≤ 59%, inconsistent monitoring.
Service Standards ≥ 90% of published standards and met and regularly reviewed.	89% to 80%, strong adherence and updates.	79% to 70%, partial compliance.	≤ 69%, outdated standards and KPIs.

4.2 Delivering on Our Promise

Element 4.2.1 Sharing Standards: We ensure that customers are informed from the outset of our engagement with them about our commitment to timely responses, quality customer service standards, key performance indicators, and contract terms, thereby setting clear expectations.

Why: It emphasises the importance of informing customers about service standards, key performance indicators and contract terms, which helps set clear expectations. This transparency is crucial for building trust.

Insights into What This Might Mean in Practice

- Create a clear welcome pack in plain English that covers service standards, key performance indicators, response times, and contract terms. Offer alternative formats and languages if required.
- Display key performance indicators, standards, and results across all customer channels, keeping them visible at all times.
- Onboarding sets expectations by informing customers of service standards and their responsibilities.
- Standardise processes across all customer touchpoints through automated emails, notifications, and SMS.
- State contract terms clearly, invite questions, and provide customers with an accessible copy.
- Train staff to communicate standards confidently. Ensure their explanations align with published commitments.
- Use feedback to review communications and track whether clarity improves satisfaction and reduces complaints.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
On-Time Service Delivery ≥ 97% on-time, proactive delay management.	96% to 90% on-time, minimal delays.	89%, to 80% inconsistently tracked.	≤ 79%, frequent delays, reactive communications.
Service Standards ≥ 90% of published standards and met and regularly reviewed.	89% to 80%, strong adherence and updates.	79% to 70%, partial compliance.	≤ 69%, outdated standards and KPIs.
Service-Related Complaints ≥ 95% resolution, low recurrence, lessons clearly implemented.	94% to 80% resolution, actions documented.	79% to 70%, follow-up inconsistent.	≤ 69%, unresolved or repeat issues.
Understanding Customers ≥ 90% verified analytics and improvement outcomes.	89% to 65% of records of engagement and use in decision-making.	64% to 50% some data outdated or unused.	≤ 49% Lack of data or evidence of use.

Element 4.2.2 Communicating Issues: We proactively address dips in delivery performance related to customer interaction standards and key performance indicators to ensure timely responses and quality service, and we promptly explain any issues to our customers.

Why: A commitment to promptly addressing dips in delivery performance and explaining to customers is essential for maintaining transparency and trust. This approach is vital as customers value clear communication and responsiveness.

Insights into What This Might Mean in Practice

- Document issues, affected customers, and solutions, and share trends with leadership to drive improvement.
- Ensure communications explain what happened, the customer impact, the actions taken, and a realistic, updated timeline.
- Make proactive communications personal and relevant. Tailor each message to the affected customer's circumstances.
- Request customer feedback on communications to assess clarity, usefulness, and reassurance.
- Train staff to spot performance issues early and communicate promptly. Use CRM alerts to detect response delays.
- Use alerts to inform customers of performance issues, and prepare templates for common problems such as repair delays, slow replies, or service disruptions.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Service Standards ≥ 90% of published standards and met and regularly reviewed.	89% to 80%, strong adherence and updates.	79% to 70%, partial compliance.	≤ 69%, outdated standards and KPIs.
Service-Related Complaints ≥ 95% resolution, low recurrence, lessons clearly implemented.	94% to 80% resolution, actions documented.	79% to 70%, follow-up inconsistent.	≤ 69%, unresolved or repeat issues.

Element 4.2.3 Benchmarking: We carefully benchmark our response time, customer service quality standards, and key performance indicators against comparable organisations, leveraging competitor insights to drive improvements and ensure our practices remain aligned with the highest external standards.

Why: It emphasises the importance of benchmarking against similar organisations and leveraging competitor insights, both of which are crucial for continuous improvement.

Insights into What This Might Mean in Practice

- Establish benchmarks to compare response times and performance metrics with peers, national data, and regulatory standards, using both internal and external evaluations.
- Involve customers in reviewing benchmarking data through panels or scrutiny groups.
- Participate in benchmarking and data sharing. Analyse results by service area, customer group, and channel to identify performance gaps.
- Record benchmarking actions and monitor results to achieve the intended improvement. Regularly review the framework to ensure comparators, data sources, and metrics remain relevant.
- Set ambitious goals using benchmarking data, targeting top-performing companies rather than the sector average.
- Share benchmarking results openly with customers, staff, and boards, along with candid notes on gaps and next steps.
- Use peer insights to identify gaps and learn from innovative practices, adapting approaches to the relevant context.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Employee Engagement ≥ 80% engagement.	79% to 70% engagement, consistent initiatives.	69% to 60%, mixed results or limited participation.	≤ 59%, declining trend / no formal measurement.
Industry Benchmarks Regular benchmarking, high ranking, proactive learning actions.	Annual benchmarking, clear comparative data.	Occasional benchmarking, limited follow-up.	Rare or outdated comparisons.
On-Time Service Delivery ≥ 97% on-time, proactive delay management.	96% to 90% on-time, minimal delays.	89%, to 80% inconsistently tracked.	≤ 79%, frequent delays, reactive communications.

Criterion 5. Connecting With Customers

5.1 Handling Complaints

Element 5.1.1 Complaints Procedure: Our user-friendly complaints procedure utilises proactive engagement and technology to track and resolve issues quickly, as required by our key performance indicators for timely response, ensuring satisfaction for all parties involved.

Why: The emphasis on a user-friendly complaints procedure and a commitment to resolving issues within an agreed timeframe aligns well with customer service expectations. Customers value clear communication and efficiency; the focus on satisfying all parties is fundamental to building positive relationships.

Insights into What This Might Mean in Practice

- If a problem can't be resolved immediately, provide clear escalation steps and inform customers when they can contact an ombudsman or regulator.
- Make the complaints procedure clear, simple, and available in multiple formats and languages.
- Openly share complaint and performance data—such as volume, responses, outcomes, and lessons—with customers, staff, and boards, and treat complaints as valuable feedback.
- Set clear timelines for each stage of the complaint process so customers can hold the organisation accountable.
- Track compliance with key performance indicators for acknowledgement, response, and resolution times, and routinely analyse complaint data to identify patterns for service improvement and root causes.
- Train staff to resolve complaints quickly and empathetically at first contact, handling simple issues without escalation.
- Use a CRM to log complaints and send automated updates to customers.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Actional Feedback ≥ 80% of customer feedback is actioned.	79% to 60% of customer feedback is actioned.	59% to 40% of customer feedback is actioned.	≤ 39% of customer feedback is actioned.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Service-Related Complaints ≥ 95% resolution, low recurrence, lessons clearly implemented.	94% to 80% resolution, actions documented.	79% to 70%, follow-up inconsistent.	≤ 69%, unresolved or repeat issues.

Element 5.1.2 Complaints Handling: We provide comprehensive training and guidance to our staff, enabling them to effectively handle complaints (both formal and informal) relevant to their roles, and empower them to undertake appropriate corrective actions as necessary, in line with our detailed complaints and escalation policy and procedures.

Why: Training staff to handle complaints effectively is crucial, as it equips them to address customer concerns promptly. Furthermore, empowering staff to take corrective actions fosters a sense of ownership and accountability, leading to improved customer satisfaction and loyalty.

Insights into What This Might Mean in Practice

- Empower frontline staff to resolve issues immediately, with clear remedies, authority, and escalation procedures.
- Provide materials, run workshops, and track progress to train contractors and partners in consistent complaint handling across the service network.
- Provide role-specific complaint-handling training so staff are equipped to fulfil their duties.
- Teach staff key complaint-handling skills: active listening, empathy, de-escalation, and clear, sensitive communication.
- Track training using quality metrics, complaints, and feedback. Provide accessible, concise guides and escalation charts for staff.
- Use real complaint cases in training and meetings to help staff develop judgement in difficult situations.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Service-Related Complaints ≥ 95% resolution, low recurrence, lessons clearly implemented.	94% to 80% resolution, actions documented.	79% to 70%, follow-up inconsistent.	≤ 69%, unresolved or repeat issues.

Element 5.1.3 Feedback & Improvement: We regularly review our complaints and feedback processes to ensure they effectively address customer concerns and inform service improvements based on customer experiences.

Why: It highlights the importance of analysing customer feedback, which is essential for understanding customer needs and expectations. Additionally, regularly reviewing the complaints and feedback procedures for continual improvement demonstrates a dedication to enhancing service quality.

Insights into What This Might Mean in Practice

- Designate a person to report complaints and feedback to governance boards, emphasising their role in continuous improvement rather than in routine operations.
- Evaluate improvements using satisfaction scores, repeat-complaint rates, and related metrics.
- Gather complaints, survey responses, compliments, and informal feedback to guide service improvements and clarify the customer experience.
- Involve customers in panels and focus groups to improve complaint and feedback systems.
- Publish regular “you said, we did” updates showing how complaints and feedback have led to meaningful service improvements.
- Set up a quarterly review to analyse complaint volumes, themes, root causes, and outcomes.
- Share complaint insights across teams and regularly review feedback channels to ensure all customers can easily voice concerns, regardless of their demographic.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Actional Feedback ≥ 80% of customer feedback is actioned.	79% to 60% of customer feedback is actioned.	59% to 40% of customer feedback is actioned.	≤ 39% of customer feedback is actioned.
Community Participation 4+ community organisations engage in sustained initiatives.	2 to 3 community organisations engage in sustained initiatives.	1 community organisation engages in sustained initiatives.	No community organisations engage in sustained initiatives.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
Service-Related Complaints ≥ 95% resolution, low recurrence, lessons clearly implemented.	94% to 80% resolution, actions documented.	79% to 70%, follow-up inconsistent.	≤ 69%, unresolved or repeat issues.

5.2 Handling Customer Enquiries

Element 5.2.1 Identification of Customer Needs: We quickly identify customer needs during the initial contact and direct them to the appropriate representative, as required by our key performance indicators, to ensure timely responses that address their concerns.

Why: By quickly directing customers to the appropriate representative, the organisation ensures that concerns are addressed effectively, minimising frustration and wait times. This proactive approach improves the customer experience and builds trust and loyalty by making customers feel valued and understood.

Insights into What This Might Mean in Practice

- Establish a unified triage process with key questions, vulnerability indicators, and resource lists to support staff in routing decisions.
- Gather feedback on triage and use satisfaction data to identify where customers feel overlooked or misdirected.
- Leverage the CRM for customer history and use IVR, chatbots, and self-assessments to handle triage before agents are involved.
- Regularly review triage and routing in line with contact volume, customer profiles, and KPIs to maintain effectiveness.
- Set protocols for handling urgent or complex cases—address crises first and ensure handovers include a summary to avoid repetition.
- Track key performance indicators such as triage speed, first-contact resolution, and transfer rates to identify areas for ongoing improvement.
- Train staff to listen actively and ask targeted questions to identify needs and signs of vulnerability.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
First Contact Resolution ≥ 85% FCR with low escalation and clear improvement trend.	84% - 75% FCR, stable and consistent.	74% to 65%, mixed results, limited improvement plans.	≤ 64%, high escalation rate.
Understanding Customers ≥ 90% verified analytics and improvement outcomes.	89% to 65% of records of engagement and use in decision-making.	64% to 50% some data outdated or unused.	≤ 49% Lack of data or evidence of use.

Element 5.2.2 Sharing Customer Information: We utilise advanced technologies, including, where appropriate, Artificial Intelligence, to facilitate the sharing of customer information within our organisation, minimising unnecessary contact and enhancing service efficiency as required by our key performance indicators, including timely response.

Why: By utilising advanced technologies, such as Artificial Intelligence (AI), the organisation can ensure that relevant customer data is available to the correct representatives at the right time, reducing the need for customers to repeat information and minimising unnecessary contact.

Insights into What This Might Mean in Practice

- Automate alerts, summaries, and notifications to streamline communication and prevent data loss.
- Conduct information-sharing audits to assess compliance and data quality, and review technology systems to improve service efficiency.
- Define clear data access rules and ensure staff understand data protection legislation.
- Gather customer feedback to assess whether information sharing improves recognition and reduces repetition.
- Share information with partners and contractors where appropriate, ensuring clear agreements and governance.
- Track effectiveness using key performance indicators, including first-contact resolution, repeat-contact rates, and satisfaction scores, to identify inefficiencies and pain points.
- Use a unified CRM to provide real-time customer profiles, applying AI and analytics to flag open cases, vulnerabilities, and past complaints during interactions.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Communications ≥98% of customers confirm that the information met their needs.	97% to 75% of customers confirm that the information met their needs.	74% to 50% of customers confirm that the information met their needs.	≤ 49% of customers confirm that the information met their needs.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.

Element 5.2.3 Communicating Next Steps: We communicate the "next steps" and expected timelines to customers when the service cannot be completed during the initial interaction, while ensuring prompt responses to all initial enquiries.

Why: Customers appreciate being informed about the next steps and timelines, especially when their issues cannot be resolved immediately. This practice helps build trust and satisfaction.

Insights into What This Might Mean in Practice

- CRM systems automate communication, acknowledge receipt, assign tasks, set deadlines, and provide updates.
- Define a protocol for handling unresolved enquiries and create templates to communicate next steps across all channels.
- Gather customer feedback on the clarity of next steps to improve templates, training, and processes.
- Monitor how often next steps are communicated on time as a key performance indicator and regularly review the communication standards.
- Notify customers promptly when timelines change, providing clear reasons and a revised resolution date.
- Set key performance indicators for response times to ensure prompt acknowledgement and clear next steps, even if full resolution is delayed.
- Train staff to provide accurate time estimates and to update customers promptly if schedules change.

POTENTIAL MEASURABLE CHARACTERISTICS

Compliance Plus	Compliance	Partial Compliance	Non-Compliance
Customer Enquires ≥ 90% of customer enquiries are resolved within 48 hours.	89% to 70% of customer enquiries are resolved within 48 hours.	69% to 50% of customer enquiries are resolved within 48 hours.	≤ 49% of customer enquiries resolved within 48 hours.
Customer Satisfaction ≥ 90% satisfaction with upward trend.	89% to 70% satisfaction, stable trend.	69% to 50% satisfaction, some fluctuations.	≤ 49%, satisfaction / unverified data.
First Contact Resolution ≥ 85% FCR with low escalation and clear improvement trend.	84% - 75% FCR, stable and consistent.	74% to 65%, mixed results, limited improvement plans.	≤ 64%, high escalation rate.

Glossary / Terms

A/B Testing

A/B testing, or split testing, is a method for comparing two versions of something—such as a webpage, app, or email—to determine which performs better. It involves showing version A (the control) and version B (the variant) to equal-sized groups of users and measuring key metrics, such as clicks or conversions, to identify which version is more successful.

Cadence

In a work context, cadence refers to the rhythm and predictable schedule of recurring activities, such as meetings, project updates, or tasks. It establishes a consistent flow for how and when a team communicates, collaborates, and progresses, providing a framework for progress and preventing chaos.

Closed Loop

A "closed loop" is a system that uses feedback to achieve a goal. In this kind of system, the output is monitored and then used to adjust the input, keeping the system on track. You can see this idea in many areas. For example, people repeat information to confirm they understood it, and companies follow up with customers to resolve their problems.

Closed-Loop Learning

Closed-loop learning is a process of continuous feedback and adjustment to achieve a desired outcome. It is a self-regulating system that compares actual performance with a target and uses the difference (error signal) to make corrections, without requiring constant human intervention.

Customer-centric architecture

Customer-centric architecture structures an organisation's processes, technologies, and policies around customers' preferences and expectations. This strategy places the customer at the core of every business decision, influencing product development, marketing, customer service, and even supply chain management. The objective is to deliver a seamless, personalised customer experience that boosts engagement and loyalty.

Fast Learning Loop

A fast-learning loop is a continuous, iterative cycle that accelerates the acquisition of knowledge and skills by rapidly moving through stages of learning, applying that knowledge, receiving feedback, and reflecting on the results. The emphasis on "fast" is on reducing the time between action and effect to accelerate improvement.

GDPR

The General Data Protection Regulation (GDPR) is a comprehensive EU law, effective from 25 May 2018, that harmonises data privacy laws, strengthens individuals' rights, and imposes strict obligations on organisations processing personal data.

Interactive Voice Response (IVR)

IVR is an automated telephony system that interacts with callers, collects information, and routes calls based on voice or keypad input. It serves as an automated attendant, enabling customers to self-serve or reach the correct department without a human operator, thereby enhancing efficiency and reducing call centre costs.

Net Promoter Score (NPS)

NPS is a widely used customer loyalty and satisfaction metric that measures how likely customers are to recommend a company's product or service to others. It is used as a standard gauge of customer experience and a predictor of business growth.

Omnichannel Strategy

An omnichannel strategy is a business approach that delivers a seamless, consistent, and integrated customer experience across all online and offline channels. It connects touchpoints—such as a website, mobile app, physical store, or call centre—so customers can move between them without friction, receiving a cohesive brand message and a personalised experience. The goal is to meet customers wherever they are and make their interactions with the brand as easy and enjoyable as possible.

Plain-English Privacy Notice

A plain-English privacy notice explains, in simple, clear language, what personal data a company collects, why it needs it, how it protects it, and with whom it shares it. Under the GDPR, it must be easily accessible (usually on a website) and outline users' rights, such as accessing or deleting their information.

Privacy Impact Assessments

A Privacy Impact Assessment (PIA), or Data Protection Impact Assessment (DPIA), under the GDPR is a systematic process for identifying, analysing, and minimising privacy risks in new projects, systems, or policies involving personal data. It is essential for compliance, for ensuring data protection by design, and for maintaining public trust.

Privacy-by-design maturity

Privacy-by-design maturity refers to an organisation's overall capability and progression in embedding privacy considerations and protections into the design and operation of its systems, services, and business practices. This progression ranges from a basic, reactive approach to a proactive, ingrained organisational culture, often measured using established maturity models.

Record of Processing Activities

A Record of Processing Activities (ROPA) is a mandatory written or electronic document required under Article 30 of the GDPR that maps how an organisation collects, uses, stores, and deletes personal data. It demonstrates accountability to regulators and serves as a central inventory of processing purposes, data categories, and security measures.

Severity-Based Targets

Severity-based targets are goals set according to the potential impact of an incident, with predefined guidelines determining severity. In areas such as IT incident management, this means prioritising actions by the severity of an issue—for example, a system-wide crash is more severe than a minor bug affecting a small number of users, even if a more widespread but less critical issue also exists. While "severity" defines the impact, "priority" is the actionable metric that often drives the response, with severity a key factor in determining priority.

Single Customer View

A single customer view (SCV) is a unified profile of customer data from multiple sources, creating a complete and cohesive record that enables a business to understand customer behaviour and preferences. It consolidates information from touchpoints such as sales, marketing, customer service, and website interactions into a single, accessible "golden record". The goal is to enable more effective, personalised customer interactions across all departments.

SMART

A SMART goal is a framework for setting objectives that are **S**pecific, **M**easurable, **A**chievable, **R**elevant, and **T**ime-bound. It ensures goals are actionable, clear, and realistic rather than vague. Synonyms for the concept include actionable, structured, and strategic, while the individual components focus on clarity, tracking, and results.

SOP

SOP stands for Standard Operating Procedure, a set of detailed, step-by-step instructions that ensure a task is performed consistently and correctly. It is used to maintain efficiency, quality, and regulatory compliance across an organisation. In some contexts, "sop" can also mean to soak or steep something in liquid.

Systematised, digital engagement

Systematised digital engagement is a structured, data-driven approach to engaging with an audience (customers, citizens, employees, etc.) across digital channels (websites, social media, email, apps, etc.). The aim is to deliver consistent, personalised, and efficient interactions that build relationships, foster loyalty, and achieve specific objectives, rather than relying on ad hoc or uncoordinated digital communications.

Web Content Accessibility Guidelines (WCAG)

The Web Content Accessibility Guidelines are the international standards for making web content accessible to people with disabilities, covering visual, auditory, physical, speech, cognitive, and neurological disabilities.

