

CUSTOMER
SERVICE
INSTITUTE
OF AMERICA

CSIA



CERTIFIED CUSTOMER SERVICE MANAGER

Nationally Accredited Level 1 Certificate and
Advanced Certificate for Customer Service Manager





contents

1 INTRODUCTION

- 3 Certified Customer Service Manager
Course Benefits
- 4 Certified Customer Service Manager
Course Features
- 5 Course Delivery and
Time Investment
- 5 Benefits for Employers Training
Customer Service Leaders

6 COURSE SYLLABUS

- 7 Course Aim and Overview
- 8 Module and Subject Outlines





Introduction

INTRODUCTION

The Customer Service Institute of America (CSIA) is very pleased to offer this program to members seeking to receive the highest professional qualifications offered by America's peak customer body. The course is a comprehensive program that will prepare you for the responsibility of establishing and managing complex customer service management systems and personnel.

The Certified Customer Service Manager (CCSM) Course has been developed to provide professional management qualifications for those in customer service leadership roles. The course is designed to provide graduates with an Accredited Professional Qualification in Customer Service Management. The CCSM course focuses on the 'science and art' of Customer Service Management and awards America's only formal and nationally recognized "Certified Customer Service Manager" designation – CCSM.

INTRODUCTION

Customer Service Managers come from a variety of backgrounds but unlike other professions, such as Accounting, there has been no formal industry body recognition.

Anyone may call themselves a customer service manager but few have any qualification other than experience to prepare them for the role. Despite job titles such as customer service director, customer relationship manager, call center manager, manager – customer experience, customer advocate, national manager customer satisfaction and consumer relations manager, few people holding these positions have any customer service qualifications. They come from diverse backgrounds – some have undergraduate degrees from a wide variety of disciplines, others have completed more generalized post graduate study such as an MBA.

A significant proportion of America's customer service managers and professionals have no formal qualifications instead gaining considerable experience at a variety of levels in the organization before working their way up 'through the ranks'.

The Customer Service Institute of America has worked with leading organizations to develop a course work, assessment and certification program leading to America's only formal and nationally recognized "Certified Customer Service Manager" designation, both Level 1 and Advanced.

The CCSM program includes a workbook, lectures, assignments and an assessment by your tutor; online support; and feedback through video messages, blogs, and e-mails.

The Certified Customer Service Manager program workbook provides all the information you require for each Module. The structure allows you to work at a pace that is right for you and fits in with your workplace requirements.

The seven modules featured in the workbook cover strategies, tools and important management skills for delivering high quality service. Each of the Modules utilize detailed theory, practical exercises and assignments and real life case studies. The goal of the workbook is to provide information and skills that can be readily applied in your organization.

Throughout the course you will gain a comprehensive understanding of the core competencies required for developing and implementing effective customer service management systems.

By understanding and 'owning' these core competencies you will be able to contribute to your organization more effectively and deliver the required results in a variety of situations that require a higher level of specialist knowledge.

The key core competencies of excellent customer service management are:

- A customer focus
- Ability to analyze and solve problems
- Leadership and personnel management
- Personnel skills and teamwork
- Effective understanding and use of Technology and infrastructure

It is time for all those in industry and the government sector with customer service management responsibilities to gain formal professional qualifications and for CEOs and human resource departments to insist on only employing customer service leaders recognized by America's peak professional body for Customer Service – the Customer Service Institute of America.



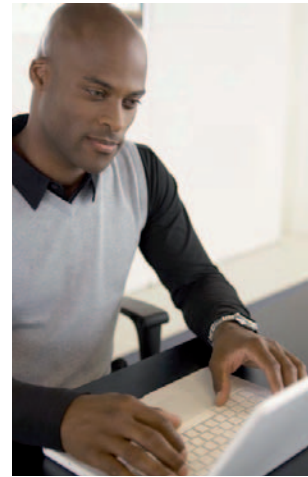
CCSM Course Benefits

In June 2004 the CCSM program became the formal professional qualification required for immediate full Membership status of the CSIA. The CSIA is the peak customer service body in America and the only customer service organization for professionals in America which is a Member of the International Council of Customer Service Organizations.

Upon successful completion of the program, graduates are awarded a free year's membership of the CSIA at full Member status and recognition of member's professional standing through a certificate and use of the CSIA's designatory post-nominal letters: CCSM. Those who have completed the Advanced Certificate will be permitted use of the Advanced Level CCSM post-nominal letters.

Becoming a 'Certified Customer Service Manager' opens many doors both domestically and internationally. The 'CCSM' designation is your passport to a leadership career in customer service. The CCSM program has been developed with a mix of technical rigor and practical workplace based projects. The course focuses on developing leaders in the customer service discipline able to quickly contribute at the organization's most senior level, including board membership.

Soon all employers will look for the Certified Customer Service Manager qualification when seeking to hire customer service personnel or promote from within.



Certified Customer Service Manager Course Features

Customer service is increasingly becoming a vital business issue as organizations realize the benefits of an integrated, strategic customer service management system for providing effective customer support. Just as other professions, such as accounting and HR, have professional qualifications e.g. Certified Practicing Accountant (CPA), professionals working within customer-focused businesses, or those managing their organization's customer service function, need to keep informed about the latest techniques and experiences.

COURSE FEATURES

- All Candidates receive Associate Membership of CSIA, full Membership is granted upon graduation.
- All Graduates will be awarded on completion of the assessment the CSIA's Certified Customer Service Manager (Level I) designation. Graduates can use the postnominals CCSM signifying their professional standing. Those CCSM (Level 1) graduates who complete the CCSM (advanced) Certificate for Customer Service Managers will be able to use the designatory postnominals CCSM (Adv).
- The certification program features a workbook, containing all readings, assignments, and projects.
- Students can work at their own pace. Activities are workplace based and are to be carried out by candidates over a 24 month period.
- The course is comprised of seven modules, each covering a vital aspect of service excellence and includes readings, case-studies, exercises and projects.
- The course has been designed to remain up to date and is subject to ongoing review by some of America's most senior customer service executives and CEOs.

Course Delivery And Time Investment Required

CERTIFIED CUSTOMER SERVICE MANAGER – CCSM

The Customer Service Institute of America is America's peak professional body for Customer service leaders. The Certified Customer Service Manager (Level I) Course is CSIA's standardized minimum qualification for designation as an accredited customer service leader.

Up-and-coming professionals in the service arena will be able to demonstrate they are suitably qualified to face the many challenges confronting today's customer service leaders by obtaining this qualification. The course is designed for Customer Service Managers with or without formal training, supervisors, and contact center or frontline team leaders seeking to develop customer service leadership and management skills.

Each candidate will be provided with America's best customer service resource, the Certified Customer Service Manager Course Workbook. It contains all the coursework, activities and readings for both the Level 1 and Advanced programs. Candidate also on commencement of the course become Associate Members of the Customer Service Institute of America. Upon successful completion of the program, graduates are awarded a free year's membership of the CSIA at full Member status and recognition of member's professional standing through a certificate and use of the CSIA's designatory post-nominal letters: CCSM.

Coaching is carried out via e-mail and telephone as required and activities are submitted via an electronic workbook. Not only do staff experience the satisfaction of completing a demanding and rigorous course but receive a prestigious qualification.

Upon completion of the workbook a final assessment and interview is conducted to confirm the candidates competency and to award the Certificate Level 1. Further work and assessment is required to progress to the Advanced qualification.

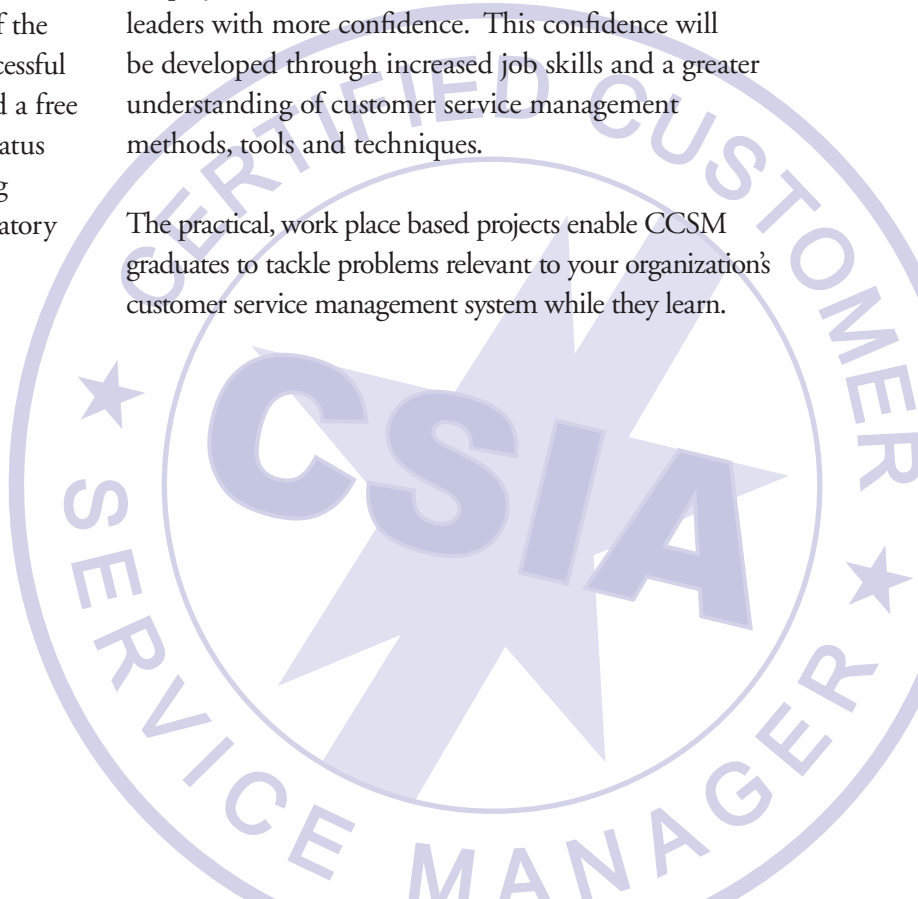
Soon all employers will look for the Certified Customer Service Manager qualification when seeking to hire customer service personnel or promote from within.

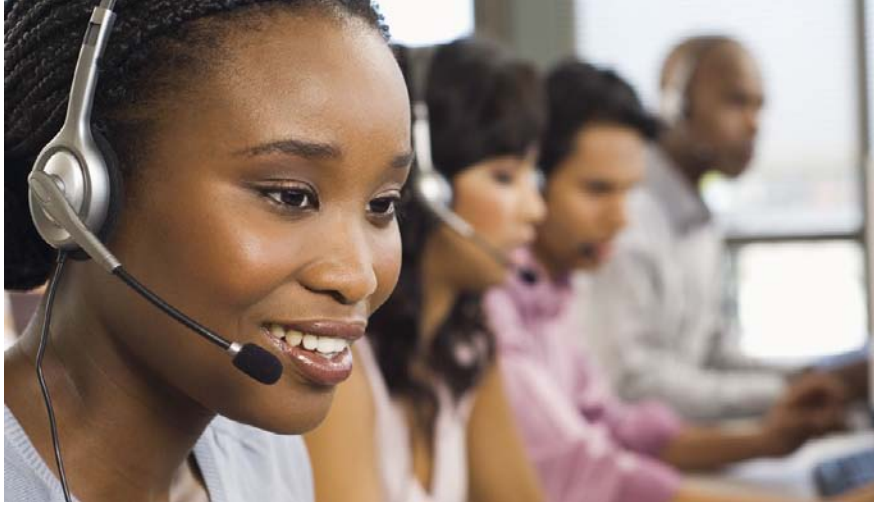
BENEFITS FOR EMPLOYERS

The goal of this professional qualification is to increase the level of customer service in organizations across America.

Employers will have access to customer service leaders with more confidence. This confidence will be developed through increased job skills and a greater understanding of customer service management methods, tools and techniques.

The practical, work place based projects enable CCSM graduates to tackle problems relevant to your organization's customer service management system while they learn.





ecourse syllabus

INTRODUCTION

Customer service is increasingly becoming a vital business issue as organizations realize the benefits of an integrated, strategic customer service management system for providing effective customer support.

Professionals working within customer-focused businesses, or those managing their organization's Customer Service function need to be kept informed about the latest techniques and experiences.

From small customer service departments to large call centers, the importance of developing a valued relationship with customers using a strategic Customer Service management system is an essential foundation of long-term business growth.

COURSE SYLLABUS

Course aim and overview: to build the culture, knowledge and skills required to develop, improve and manage any customer service environment. By the end of this course, graduates will be able to:

MODULE 1: Understand the value of a customer service philosophy for business growth and service excellence

- Identify and define a diversity of attitudes, knowledge and skills required to focus on customers and customer needs
- Address diverse customer needs and values
- Describe how leadership, vision/mission statements and application of resources influence an organization's customer service focus

MODULE 2: Develop and assess the success of a customer service management system including the International Customer Service Standard and certification trustmark program

- Develop an integrated approach to customer service process management
- Understand implementation, assessment and compliance with the International Customer Service Standard
- Explain how to use best practice methodology to increase market share and customer retention

MODULE 3: Display service leadership

- Identify key customer service leadership principles and skills
- Apply customer service management principles and models to your work
- Nurture your own leadership skills and identify opportunities for self-improvement
- Develop leadership skills for influencing, correcting and leading a customer-driven organization
- Develop and manage reward and recognition programs

MODULE 4: People management

- Recruit and select customer-centric employees
- Develop teamwork systems
- Develop enhanced strategies to manage attendance and staff retention

- Assess the attitude, skills and competencies of employees with regard to providing high quality service centric outcome
- Effectively monitor employee performance and satisfaction levels.

MODULE 5: Understand and develop infrastructure and technology

- Develop operating systems that support excellent customer service
- Identify relevant technology solutions and how to effectively benefit from implementation
- Improve service delivery and process management
- Effectively assess outsource providers and the impact on customers of these strategic partnerships
- Devise a strategic system which handles customer inquiries and billing as well as retaining and growing clients

MODULE 6: Effectively utilize measurement systems and tools

- Develop and implement a balanced scorecard to measure and predict customer service performance
- Describe the means of measuring and analyzing both internal and external customer satisfaction
- Design and implement a world class complaint management and feed back monitoring system able to feed into continuous improvement

MODULE 7: Ensure integration and operationalization

- Drive exceptional customer loyalty through best practice customer service
- Develop a plan for implementing and integrating a customer service management system in the workplace
- Expand, strengthen, and improve your organization's customer service processes
- Maintain momentum for customer service excellence



Module Outlines

The CCSM course have been designed by some of the most innovative customer service thought leaders in consultation with Chief Customer Officers and senior executives from award-winning organizations. The purpose of this course is to train customer service leaders to deliver customer service excellence as part of overall efforts to improve customer service and increase customer advocacy. In return for this training investment CSIA will deliver managers who are: more innovative, more efficient, save the organization money by understanding the Cost of Bad Service™, grow the business, and enjoy working with your customers, in fact, building long term relationships with them which encourages customers to spread positive 'word of mouth' advocacy leading to increased referrals.

Each aspect of the course will focus on achieving specific objectives through classroom exercises and enhanced through each participant continuing their learning after the training via the recommended readings and activities. Students that complete the CSIA Accredited and Nationally Recognized courses receive certificates recognizing their achievement in attaining the qualification.

MODULE 1

Customer service for business growth and excellence

I don't know the life-time value of one of your customers, do you? Statistics abound regarding the importance of customer retention and how its easier to keep a customer than get a new one. It is not so hard to understand why customer service is important but defining what customer service really is can be more difficult.

This module will provide plenty of discussion on just those issues. Defining the customer, knowing who your customer is and sometimes, more importantly, isn't is another key learning area. Sometimes it can be better to say no to new business.

This module will use examples to illustrate what effective customer service means across a variety of industries. The message is we all have customers no matter what industry or part of the organization we work in. Giving the ultimate customer experience requires providing the internal customers in the chain with the support they need. This module provides an introduction to customer service, offers some sample service delivery models and an inventory of service strategies.

LEARNING OBJECTIVES

At the end of this module, you should be able to:

- Explain the importance of customer service for achieving strategic business objectives.
- Explain the concept of 'customer loyalty'.
- Define the term 'customer service.'
- Explain the term 'Strategic Customer Service.'
- Explain the importance of identifying customer types and customer expectations to the creation of a successful customer service strategy.
- Understand and appreciate the importance of the internal and external customer.
- Describe what is meant by the term 'chain of service support.'



MODULE 2

Strategic framework for a customer service management system

Customer service in many organizations is left to a separate division or a call center. It is often managed in a reactive way despite the ideal promoted in various company vision and mission statements. This module challenges students to examine the way customer service is positioned in the organization and how to develop a framework that will integrate high standards of customer service across the whole organization.

This module will demonstrate why a customer service professional is as important member of the board as the finance director and how customer service standards are as important as accounting standards for a healthy corporation.

LEARNING OBJECTIVES

At the end of this module, you should be able to:

- Illustrate why a customer service strategy should be integrated throughout an organization.
- Describe how an organization's business objectives should be aligned to achieve recognized customer service outcomes.
- Use balanced scorecard methodology as applied in the International Customer Service Standard to assess your organizations ability to deliver customer service outcomes.
- Analyze the components of various organizations' customer service vision, mission and strategy and discuss the suitability of each for the business operating environment.
- Explain how an organization's customer service strategy can affect its costs, asset utilization, and growth.
- Map processes throughout an organization from 'end to end' to ensure the enterprise delivers products and services according to identified customer specifications with guaranteed predictability and consistency of delivery.
- List the tools for aligning an organization towards a customer focussed strategy and continuous improvement.

The rigorous process involved in completing the audit and in meeting the standard has allowed us to look at the service we provide with a difference lens. I am confident it will add value to Westpac's commitment to customer service excellence.

Tim Harrington
General Manager Product & Marketing
Westpac

MODULE 3

Leadership for service excellence

Unlike doctors, lawyers and accountants customer service professionals arrive in the position from a diverse array of academic and work experience backgrounds, Despite the lack of a formal career path, leaders in the service area require special skills and a thorough understanding of the complex role they play in the organization. Managing a team of frontline service professionals is as much an art as a science especially when it comes to creating the all important ‘company-wide customer service culture’ – some organizations get it right and many don’t. This module asks ‘what are the characteristics of a customer service leader?’ And ‘what environment will provide you with an empowered customer focussed workforce?’

LEARNING OBJECTIVES

At the end of this module, you should be able to:

- List the skills and qualities required of a customer service team leader and manager.
 - Formulate job descriptions for customer service leaders in a number of industries.
 - Explain what is meant by the term ‘Customer Focussed Culture’ and why it is desirable to develop such a culture throughout an organization.
 - Judge the various strategies undertaken by organizations seeking to develop a ‘Customer Focused Culture’.
 - Summarize the benefits of employee retention and outline why employees become dissatisfied.
 - Understand and combat issues causing absenteeism and turnover.
- Recognize the importance of training employees and list some of the skill sets required for service delivery outcomes.
 - Briefly discuss the requirements of effective training programs.
 - Describe the value of an empowered workforce and demonstrate how to establish guidelines for the effective empowerment of employees and measure the effects.
 - Recommend motivational techniques for employees in a number of categories and industries including recognition programs.
 - Design a process to maintain and continually improve your leadership skills.
 - Set challenging objectives and goals for your team to achieve customer service outcomes.



MODULE 4

People Management

Ask most frontline customer service personnel if they would rather deliver good or bad service and almost all of them would say good. So why is it that so many customers in America complain about receiving bad service?

Ask the CEO of a successful organization with a reputation for providing good service, 'why is this so?' and she will tell you 'its good people'. Probe further and you will be informed it comes down to recruiting the right people, training them and putting them in a workplace designed for success. Such an approach we are told will reduce turnover and maintain motivation. Yes it is easier said than done, but this module unlocks these mysteries.

LEARNING OBJECTIVES

At the end of this module, you should be able to:

- Classify staff as customer facing or support personnel.
- Design a recruitment and induction policy for customer facing and support personnel in a number of industries.
- Plan and create a sample customer service training matrix.
- Explain the characteristics of various HR policies and people charters.
- Summarize the requirements of effective workplace design in a number of environments, including, call-center.
- Show why quality people become dissatisfied and leave organizations.
- Calculate the cost of high staff turnover.
- Demonstrate the ability to find and quote relevant HR and OSHA legislation.

It is exciting to have a dedicated and specialized course available to Customer Service Managers. The industry is constantly changing and quickly. Delighted customers and engaged employees are key to a successful business. To have a resource such as this to learn further about best practices and international standards is vital to the success of any industry and I want to be part of it.

Rebecca Lees
Commonwealth Bank

In working through the seven modules I have learned many aspects of the profession I did not previously know. Most importantly, I have been able to implement a number of very positive changes; all of which go towards Baxter reaching our mission 'To make a meaningful difference in patients' lives.'

Anthony Keyes
Baxter Healthcare
Customer Service Manager

MODULE 5

Service infrastructure

Staff will quickly lose motivation and resign if the infrastructure they are expected to work within is not designed to enable them to provide good service. Some questions you need to be able to answer:

- Does Client Relationship Management (CRM) software solve all your customer service problems?
- What should you ask of your CRM systems?
- Is your organization physically configured to facilitate desired service outcomes?

What investment in customer service infrastructure is appropriate for different scenarios? A good rule in customer service says you cannot deliver a Rolls-Royce for the price of a mini!

This module asks you to consider the various technological infrastructure available and analyze the merits of some of them. The module will draw on information from vendors and ask for an examination of the infrastructure in the student's current or previous workplace.

LEARNING OBJECTIVES

At the end of this module, you should be able to:

- Judge the merits of CRM solutions.
- Discuss the merits of a '360 degree view' of your customers.
- Apply the relevant privacy legislation to your current customer service system.
- List the customer service infrastructure requirements of your organization paying particular attention to work space, technology, hardware and software.
- Create a criteria to measure the appropriate level of investment in customer service infrastructure for your organization.
- Explain how technology can be used to enhance customer transactions for exiting and future customers including managing information from customer surveys and feedback.

MODULE 6

Measurement and continuous improvement

First a cliché: What gets measured gets done!

What are your customers' expectations? How do you find out and manage these expectations to deliver a service that is slightly above what they expect?

As a leader responsible for delivering service that consistently satisfies customers, you have a responsibility to understand what the service level requirements of your customers are and, using this information, set organization wide standards. The service standards then have to be broken down into specific Key Performance Indicators measured throughout the company.

The goal is to deliver the service levels customers want cost-effectively, both in for-profit and not-for-profit organizations.

Measurement of customer service standards also performs a vital role in the continuous improvement process as the data is fed into many areas such as product/service design, training and investment.

LEARNING OBJECTIVES

At the end of this module, you should be able to:

- Set objectives for customer satisfaction measurement.
- Describe the key components of customer feedback systems and explain how the information can be incorporated into a continuous improvement program.
- Use customer feedback and surveys to understand and manage customer expectations.
- Analyze customer expectations and use them to set organization-wide service standards and KPIs to measure that the standards are being met.
- Conduct a self-assessment of your organization using the International Customer Service Standard.
- Outline the ways customer satisfaction measurements can be utilized across your organization.
- Rank the importance of exceeding customer expectations in the organization-wide budget process.
- Contribute to a continuous improvement strategy that would ensure your organization is able to meet or exceed customer expectations; remembering that these expectations are constantly rising.



MODULE 7

Integrating and operationalizing the strategy



The aim of this course is to develop leaders who understand strategic customer service and clearly the previous topics focus primarily on developing the strategies required to create the environment where desired customer service outcomes are delivered.

This module examines what happens when the rubber hits the road—how your strategies can be implemented in the real world and what tools are required to take the customer service policy from the vision and mission statements to the frontline.

The module will cover some of the types of systems and processes that need to be developed and implemented. It also offers some examples and insight into the barriers to creating a customer focussed organization.

LEARNING OBJECTIVES

At the end of this module, you should be able to:

- List the tools available to a customer service practitioner in implementing a customer service strategy that becomes integrated throughout an organization.
- Examine process flows to find and eliminate weaknesses.
- Practically apply the concept of 'Passion and Process' to your organization and describe the balance between the two.
- List the hurdles to be overcome when moving towards a customer focussed organization.
- Discuss techniques used to instill a practical understanding of the vision, mission and policy with regards to customer service throughout the organization.
- Compose an example of how training needs and continuous improvement opportunities, once identified, can be successfully implemented.

How To Apply

Due to the personal attention provided to each candidate's projects and work book, course places are strictly limited each business quarter. A detailed application must be completed and forwarded to CSIA in the first instance. Qualifications, experience and references will be checked prior to acceptance of candidates and processing of course fees. Please go to www.serviceinstitute.com and go to Training