

# Customer Service Standard



**Putting the customer  
at the heart of our delivery**

**Version 1.07**

## Document Control

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## Distribution & Approval List

A – Approval required: The agreed turnaround of this document will be 5 days. After 5 days approval will be explicit by default.

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# 1. Introduction

## Purpose of Document

We know that quality, customer service and the safety and protection of our customers is incredibly important to us. Regardless of size, structure and maturity of our organisation we must establish an appropriate management framework to be successful. This document aims to set out our approach to the management of customer services and standards within Working Links. We have aligned the standard to our values. Our values set out the way we do things, they help us to pinpoint the things that matter – those things which will make the biggest difference and ultimately help us achieve our vision.

Following Share Sale, and during transformation, we will review our Customer Services Standard to incorporate proven best practices already in place in the CRC.

## Background

Our framework **aims** to:

- Create a “customer first” quality management system which puts a high challenge and rewarding service in place to enable customers to be supported towards achieving their goals;

***“I want our customers to walk through the door of the office and feel important, that they are treated as an individual in a very personal and professional way” – Brian Bell, Chief Operating Officer***

- Provide clearly defined objectives, targets and measures;
- Support the requirement to standardise, streamline and enforce adherence to operational business processes;
- Provide a common vocabulary and way of thinking of **What Good Looks Like** (WGLL);
- Assess where we are on the path to achieving WGLL, helping us to understand our key strengths and opportunities for improvements;
- Integrate existing and planned initiatives, removing duplication and identifying gaps; and
- Maintain and achieve other external accreditations, for example ISO 9001, Matrix and Merlin, including adherence to company policies and processes

***“Excellent organisations achieve and sustain outstanding levels of performance that meet or exceed the expectations of all their stakeholders” – EFQM Excellence Model 2013***

## Document References

Document	Link
User Handbook	Refer to Framework
Scoring Table	Refer to Framework
Mesma	Click on hyperlink <a href="#">Mesma</a>

## Glossary

Term	Definition
CSS	Customer Service Standard – Quality Standard
Customer	Click on Hyper link to identify “ <a href="#">Who are our customers?</a> ”
QMS	Quality Management System
WGLL	What Good Looks Like
NPS	Net Promoter Score
MSL	Minimum Service Levels
Mesma	On-line self-assessment reporting tool. <a href="http://www.mesma.co.uk">www.mesma.co.uk</a>
WL	Working Links
E&D	Equality & Diversity
OTLA	Observation of Teaching, Learning and Assessment
IAG	Information Advice and Guidance
ICT	Information and Communications Technology
H&S	Health and Safety

## Scope

The Standard is based on a set of **criteria** under main headings:

1. Outcomes;
2. Customer Experience; and
3. Management Practices.



Each **criteria** is underpinned by several **aspects** which describe what we expect from operational activity to support our goals and provide evidence of achievement. For example, customer experience is underpinned by;

- First impression;
- First appointment;
- Initial Assessment and Action Planning;
- Planning and Resourcing;
- Monitoring Provision; and
- Advice and Guidance.

All **contracts** are required to meet the minimum requirements of this standard. Working Links internal delivery is required to self-assess against the standard and report annually. Partner organisations must demonstrate that they have quality improvement processes in place and a self-assessment, monitoring and reporting cycle which evidences adherence of our minimum standards outlined within this document.

The reporting structure is demonstrated below. Partnership and Provision (P&P) teams are not excluded from this reporting process, it is important that all P&P teams operate a quality monitoring cycle with partners to 'dip-sample' partner adherence and quality management processes in line with actions identified as part of partner Quality Management System (QMS) verification process. The collation of this data must be reflected within contract level reporting in line with our cycle.

All our people have a role to play regarding quality, which starts from our Executive Team to our front-line delivery teams. Quality Improvement is addressed at every internal team meeting at all levels and at formal contract reviews with our partners.

[Appendix 1](#) outlines management reporting involvement however this is not limited to these roles.

## 2. The Standard

As outlined within scope the standard is made up of three main criteria and subsets of the related aspects, with each aspect having its own measures for achieving overall quality. These are described below.

### Outcomes

#### Criteria definition

Although positioned first within the structure, outcomes have an impact through the whole of the standard. Outcomes for customers are not only linked to **Contractual/business Targets**, but soft outcomes which measure customer progression, personal, social and employability skills.

The aspects this section will look at are:

- **Achievement** – which takes into account progress by different customer groups;
- **Progression** – against customer's identified starting point, achievement of action plan goals and progression into employment, training, education and development of soft skills
- **Participation and Retention** – takes into account customer attendance and participation with the programme.

#### 1a Achievement

- Outcome and other measures (contractual and Working Links) **exceeds** targets by 5% within period of measurement. In cases where outcomes have started low but are making significant improvements, we must demonstrate these improvements have been sustained for a period of more than 6 months.
- We demonstrate good use of data to identify gaps in achievement between different customer groups and across different types. (Sector and levels of provision). Gaps no greater than +/- 5% of internal national average.
- Clear actions are identified to address the gaps and targets are set to improve the performance of the underperforming groups, performance improvement is clearly evidenced by the actions taken.
- Good use of workforce development activities relevant to the customers' employability and progression to address challenges.
- More than 90% of customers find that training they have undertaken relevant and suited to their needs.
- Post-outcome support is available and encourages customers to remain engaged and progress personally. The support offered is aligned to employer support and customer satisfaction with the support they are receiving exceeding previous quarter results.

#### 1b Progression

- All customers make outstanding progress throughout their time with us compared to when they started.
- All action plans reflect progress made; customers and consultants can clearly recognise progression to date, understand reasons for achievement and identify next steps.



- The customer has an extremely good understanding of where they want to be and how they get there, is very confident in asking for support and guidance, and are actively seeking out new ways to achieve. (*Evidence source: Customer Engagement Tracker*).
- Communication is highly focussed on checking understanding and is a dynamic two-way process to improve customer's long-term prospects. (*Evidence source: Observation*).
- All customer listening groups are conducted with a focus on customer progression and results used to enhance delivery and increase performance are clearly evidenced.
- Customers confirm they feel that they have progressed closer towards their goals as a result of their last interaction with us. (*Evidence source: NPS*).

### 1c Participation

- Customer attendance should be appropriately managed in-line with contract specific delivery requirements and Minimum Service Levels (MSLs). As a minimum standard – but not exclusively – customers attend on time and engage with the programme and their individual progression (Failure to Attend rates are monitored and actions taken to understand reasons for non-attendance and clear improvements demonstrated).
- Challenges overcome are recorded; the customer journey is supported and demonstrated.
- Frequencies of reviews are appropriate to the needs of the customer, contract, and actions recorded. (All customers have frequent and meaningful contact with their consultant).
- Standards and expectations are clearly communicated throughout interventions.
- High quality interventions lead to superb outcomes (*Evidence source: Observations of IAG and OTLA results*).
- Reviews should be conducted at the end of the customer journey, tailored to the reason for leaving and provide the customer with support or direction beyond completion of their time with us.
- All customers receive feedback regarding their progress and understand what they need to do to improve in order to achieve their goals, and are able to describe what stage they are at in their journey to achieving their goals (*Evidence source: Less than 15% of customers are unhappy with the service we provide*).
- The management and pace of interactions is excellent and promotes achievement of outcomes.

### Results

These are key financial and non-financial business outcomes which demonstrate the deployment of our delivery models and MSLs. Key financial targets are agreed individually for each contract and funder:

- Performance against contractual targets;
- Minimum Service Level performance;
- Achievement gaps;
- Customer service (Survey results, Customer Listening Groups); and
- Complaints handling.

## Customer Experience

### Criteria definition

Here we are looking to describe what we do and how well we deliver our services. The most important purpose of the customer experience is to promote, develop and support customers in their progression, therefore improving **Outcomes**. Throughout the whole of the customer journey, from the moment they join us to the end of their time with us, we should be asking ourselves, “**Are we having a positive impact on the customer?**”

When evaluating the individual elements of the customer journey, we should make reference to performance and achievement of targets relevant to individual customers but also test the impact of the end-to-end journey (using the tools provided).

The aspects in this section look at:

- **First Impression** – which the customer forms about when we first contact them or provide services to them;
- **First Appointment** – the customer’s first appointment with us;
- **Initial Assessment and Action Planning** – How we conduct Initial Assessment and Action Planning activities with the customer;
- **Planning and resourcing** – our approach;
- **Monitoring provision** – The processes we have in place for monitoring provision and ensuring its effectiveness; and
- **Advice and guidance** – our ability to provide high quality and challenging advice and guidance to customers.

### 2a First Impression

- Customers know what we offer. Direct or indirect marketing to customers depending on mandatory or voluntary engagement.
- Defined marketing and engagement strategies which ensure all customers have equal access to engagement.
- Marketing materials are suitably accessible for the intended customer group.
- Partners, stakeholders and employers are well informed of what we offer and can competently communicate our services to potential customers.
- Customers are enthusiastic about the services with which they are about to engage.
- Customers receive the same level of engagement irrespective of Working Links or partner delivery.
- Customers have access to good quality, accurate and detailed information about their first appointment with Working Links, setting appropriate expectations as to the full customer journey not just the next stage of the process.

### 2b First Appointment

- Customers are made to feel safe from first appointment throughout their journey giving the customers the opportunity to ask questions as to what their participation means to them including their safety and wellbeing on the programme.
- Customers feel that their concerns and needs have been listened to from first appointment.

- Consistent introduction to programme, setting expectations, setting understanding of rules/standards, for example, equality and diversity (E&D), safeguarding, health and safety, Working Links customer pledge, the customer feedback procedure – including complaints – rights and responsibilities as a customer.
- Customers understand programme engagement and are made to feel safe and respected.
- Information is communicated in a clear, accessible and inclusive manner and meets the needs of the customer.
- Setting customer expectations as to the local available labour market and access to services.
- Customer understanding of all elements of introduction to us is validated.
- We set out the first few stages of their time with us and encourage customers to work in groups and also independently to develop their skills.
- Customers are made aware of what is expected of them in their participation with our services, and the consequences of failure to engage on mandated programmes.

## **2c Initial Assessment and Action Planning**

- Initial Assessment is comprehensive, accurate, and fair. Managed effectively, it enables our customers to progress. Consultants acquire knowledge of IAG options and understand what is required to make exceptional improvements for our customers.
- Assessment tools are used to identify customer needs in functional skills (English, Maths, and IT needs), ESOL, Skills for Life agenda (speaking, listening, reading and writing) and other support needs, for example, drug, alcohol or health issues, mental health or ex-offenders (*cross reference 2d*).
- Assessments must allow for us to identify and understand the risks associated with customers and manage them accordingly.
- Following Initial Assessment, a baseline will be set from which we can measure progress and record in an action plan which is individual to the customer.
- Consultant and customer are enthusiastic and engaged in the planning process and they both recognise the benefits of the process.
- Customer support needs are recognised and acted upon from the outset and reflected in their individual tailored action plan, with clear goals and actions to achieve these.
- Management and pace of the interaction is excellent and promotes achievement of outcomes.
- Action planning is continuous and challenge is extremely well managed and there is a genuine commitment to succeed from the consultant and customer.
- Consultants and Tutors are highly adept at working and developing skills and knowledge with customers from different backgrounds.

## **2d Planning and Resourcing**

- Good use of data and rationale to plan and design products and services to ensure a complete service for all customers.
- Assessment tools are used to identify and address functional skills (English, Maths, and IT needs), ESOL, Skills for Life agenda (speaking, listening, reading and writing) and other support needs (drugs, alcohol or health issues, mental health or ex-offenders). (*cross reference 2c*)
- Customers understand and demonstrate the safe use of ICT resources.
- Customers have equal and inclusive access to available facilities and resources to enable progression.

- Range of suitable employers and vacancies are sourced to meet the needs of our customers in-line with local labour market.
- Safe, welcoming and accessible environment to the customer. Access to private space for personal conversations is available when needed.
- Customers still have access to the required facilities and services to enable progression within the constraints of their learning environment even if they are unable to access our services directly.
- Our people and those of sub-contractors and other external agencies are experienced and appropriately qualified at working with our customers and gain a good understanding of individual needs.
- Resources, including property, facilities and equipment are used effectively and creatively to promote and support learning and progression.
- Caseloads and teaching environments are reviewed for effectiveness, with actions and improvements which demonstrate customer progression identified.
- Sufficient levels of people employed to deliver the customer journey.

## 2e Monitoring provision

- Teaching, Learning and Assessment (OTLA) takes in to consideration the Skills for Life agenda and the embedding of these skills (speaking, listening, reading and writing), functional Skills (English, Maths and ICT) and embedding of Equality and Diversity awareness and Safeguarding.
- Teaching and learning develops high levels of resilience, confidence and independence in customers when they tackle challenging activities. Our people check customers' understanding effectively throughout learning sessions. Time is used very well and every opportunity is taken to develop crucial skills successfully. (*Evidence source: Mesma OTLA Grade Criteria*).
- Tutors and consultants encourage and motivate most customers to participate in a wide range of learning activities. Every opportunity is taken to develop their literacy and numeracy skills on other courses and at work (*Evidence source: Mesma OTLA Grade Criteria*).
- Specific tailored provision delivered for employer demand meets the needs of employers and customer with high success rates.

## 2f Advice and guidance

- Customers experience a smooth transition between IAG Support and referrals to Tutor delivery sessions (*cross reference 2e*).
- Customers are made aware of what is expected of them in their participation with our IAG support.
- IAG must be relevant to customers' needs and support them in their progression.
- Customers should recognise the benefits of the IAG support received.
- Customers recognise the benefits of developing their personal and employability skills to meet local labour market needs
- Customers receive assessment, and activities are appropriately planned to provide them with the support and training they need to increase their chances of sustained employment, achieving outcomes and improving life skills.
- We have the means to measure the impact of the outputs from customers completing learning.
- Achievement gaps for different groups of customers are recognised and acted upon.

- Partners, employers, sub-contractors and funding agencies are used effectively to ensure activities, specialist support and training is relevant to supporting our customers to remove challenges and achieve goals. *(Cross reference to 2d planning and resources)*.
- Highly confidential and safe environment where mutual respect and dignity exists.

## Results

These results are based on customer perceptions and internal measures which should give us a clear understanding of the effectiveness of the deployment of our processes against our service delivery standards.

- Minimum Service Level performance;
- Addressing achievement gaps;
- Customer Satisfaction (relationship and service);
- Complaints handling;
- Customers, Partner and employer input into service design;
- Product utilisation and effectiveness;
- Impact on service delivery and value for money;
- Quality Assessment results (internal and external including ISO9001);
- Observations;
- Caseload reviews;
- Employer strategy; and
- Employer Engagement Survey.

## Management Practices

### Criteria definition

This looks at our effectiveness of Management Practices and how the wider Community, Partnership, Employers and our approach to Continuous Improvement impacts on the achievement of outcomes and customer service.

The aspects in this section look at:

- ***Communication***
- ***Equality & Diversity***
- ***Safeguarding***
- ***Our People***
- ***Partner Management***
- ***Quality Improvement***
- ***Sustainability***

#### 3a Communication

- There is a clear and consistent statement of the direction and ambition of the company from its leaders including mission, vision, values and ethics. Contributions are understood at all operational levels and the measurements of those are continuous.
- Clear commitment of two-way feedback process in which senior management listen, respond and react to feedback from all levels within the business.
- Our people understand their personal contribution to achieving company vision.
- Operations and support functions understand their contribution to the growth and success of the company and our approach to service design. Messages are communicated in a clear and consistent manner to all audiences.
- Leaders promote and communicate change effectively and measure and review changes made for effectiveness.

#### 3b Equality and Diversity

- All our Managers have a commitment to recognising, understanding and following company policy.
- Promotion of our commitment to equality and diversity to our customers, our people, partners, employer's stakeholders.
- Recognising the customer groups we engage and actively monitor and respond to changes in these groups to narrow achievement gaps.
- A commitment to live the values of the shared promise on customer care to fair treatment.
- A commitment where possible to provide a fair and equal service to customers of alternative languages.
- Use of data to inform service design and planning and changing service delivery.
- How the services we provide are tailored to meet the profiled distribution of our delivery.

#### 3c Safeguarding

- Our people understand their own responsibilities to promote and protect customers through safeguarding.

- All Customers are able to recognise unfair, unsafe or abusive treatment by others and know how and when to take action to protect themselves and others including those Customers with specific health conditions or learning difficulties.
- Our people take action to identify and respond appropriately to customers' welfare concerns.
- Individual risk assessments are carried out for vulnerable customers where appropriate.
- We actively promote and follow our safeguarding process. Our senior managers promote, validate understanding and have commitment to, our safeguarding policy.
- Customers feel safe whilst participating in our programmes – internal or external – and are actively involved in discussing safety and safeguarding with us
- Customers are happy that concerns with health and safety, safeguarding, complaints and feedback are dealt with quickly and effectively and are informed of any changes.
- Customers recognise and understand the customer charter.
- Customers have the knowledge to protect themselves in any environment we are responsible for, for example, employers and subcontractors.
- All Customers have equal access to appropriate support and services available from Working Links regardless of contract.
- Customers are provided appropriate support at all stages of their customer journey including post-employment or outcome support.
- We do not knowingly put our customers in a position of risk.

### **3d Our people**

- We ensure all our people are recruited based on their competence, attitude, skills, qualifications, experience and background.
- People adhere to our all our company policies.
- Adherence to business process to ensure consistent and compliance against expected standards.
- Our people are recognised and rewarded for their achievements.
- We demonstrate commitment to improve the skills and capability of our people (learning in general).
- We promote and encourage our people to take ownership for their learning and we support this through internal and external learning.
- We ensure that our people have the required knowledge on legislative, contractual and procedural requirement, for example, safeguarding, in order to support our customers.
- We engage and act upon feedback from our people to improve the quality of our services. People are involved and empowered to make quality improvements.
- Our people's commitments and expectations drive improvements in provision.
- We monitor the suitability of our people and sufficient resources in order to help customers overcome their challenges to employment.
- Our people reflect where possible the local demographics and communities.

### **3e Partner Management**

- Partners are procured and managed in line with our National Commissioning Strategy.
- Open and transparent monitoring and management arrangements are in place to measure partner organisations.
- Partners deliver to the same standards, equality and diversity, environmental and quality expectations that we would expect of ourselves.
- Partners follow our operational process where it is expected of them.



- All partners experience consistent approach to management across region and the wider business.
- We support partners and understand their needs and shape delivery of our services based on this.
- Actively promote the development of services within supply chain.
- We encourage an open and honest dialogue and communications with representatives from all partners.
- Actively promote sustainability through supply chain which meet the needs of both parties.
- Performance management practices and actions are fit for individual partners without compromising commissioning strategy.
- We seek continuous feedback from both partners on the quality of our supply chain management, and from customers who have received services from partners, and look to improve both our and that of our partners process as a result.
- Promotion of best practice throughout the supply chain is encouraged and captured.
- Information sharing of performance, strategic direction and other leadership practices are planned, suitably frequent, structured and appropriate to our partners.

### **3f Quality Improvement**

- We have a national agreed standard (this document) which is actively engaged and used throughout the organisation and our senior managers and leadership team actively promote and engage in continuous quality improvement at all levels within the company.
- Our people at all levels have a role to play in quality improvement, design and improvement of delivery and services provided to our customers.
- All self-assessments (Mesma) are completed in-line with company policy, timetables and processes which incorporate the views of partners, customers, employers and our people and are used as a tool to secure improvements across provision, and tackle under performance.
- All quality improvements are recorded and have recognised owners and timescales.
- Processes are effectively designed, managed and improved to allow the delivery of a quality service to all stakeholders.

### **3g Sustainability**

- Our national '*Getting it Right*' policy is used and reflected in locations across the business.
- Action Plans are created for each location to work towards national targets.
- All our people are aware of their responsibilities regarding sustainability and each office has a sustainability representative to drive monitor progress and performance.
- Sustainability is promoted to our customers, partners, stakeholders and employers.



## Results

These are the key financial and non-financial business outcomes which demonstrate the success of the deployment of our strategy. It will also include our people, employer and partner perceptions of us to give us an understanding of effectiveness of the deployment and outcomes of our strategy and supporting policies and processes.

- Strategic plans;
- People Satisfaction Survey results and improvements;
- Partner and Employer Satisfaction survey results and improvements;
- Performance Management
- Competency and performance management;
- Learning and development;
- Reward and recognition;
- Effective communications;
- Financial outcomes;
- Key process outcomes;
- Environmental impact;
- Product utilisation and impact;
- Merlin Standard; and
- Feedback from other external standards and or awarding bodies.

### 3. Summary

Through the effective use of our Quality Management System (QMS) described in this document, we should be able to clearly demonstrate the quality of service we provide to our customers. It is of great importance that all our people recognise just how important it is to be able to measure where we are doing well, as well as being able to identify areas for improvement.

Furthermore, the QMS will allow us to identify best practice within the business which can become default processes elsewhere.

Finally, and most importantly, *all* our people must see the use of the standard as the means of ensuring that everything we do is focussed on ensuring that our customers feel engaged, and recognise the value of what we do.

## Appendix 1

