



GUIDE 76

Development of service standards — Recommendations for addressing consumer issues

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

International Standards are drafted in accordance with the rules given in the ISO/IEC Directives, Part 2.

Draft Guides adopted by the responsible Committee or Group are circulated to the member bodies for voting. Publication as a Guide requires approval by at least 75 % of the member bodies casting a vote.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights.

ISO/IEC Guide 76 was prepared by the ISO *Committee on consumer policy* (COPOLCO).

This corrected version of ISO/IEC Guide 76:2008 incorporates the following correction:

- correction of the term “responsibility” to “social responsibility” in the example to point 5 in Table 1 on page 10.

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Introduction

0.1 Standards are increasingly being developed to cover services. This Guide has been prepared to help standards developers in these areas to take account of consumer requirements. It elaborates on the aims of service standards, set out in the ISO/IEC publication *The consumer and standards — Guidance and principles for consumer participation in standards development*^[25]. In addressing the major concerns of consumers, standards can help by representing a consensus on the best knowledge and experience available worldwide.

0.2 This Guide is intended for those involved in the preparation and revision of standards for services, whether International Standards or national standards in developed or developing countries. With its checklist and examples, it also contains information which might be useful for others, such as service providers and educators.

0.3 Service delivery can involve complex relationships and structures, frequently involving many different organizations. Additionally, consumers engage with a variety of public services, such as medical provision or education, for which formal contracts and direct payment might not be applicable.

0.4 In a global market, it is logical that consumers expect to benefit from access to a wider choice of services and service providers. There is also continuing demand for lower prices that are not contrived to disadvantage certain markets and communities. Quality, economy and efficiency are sought, whether or not the consumer pays directly for a service. There is also increasing consumer concern about the need for sustainable development.

0.5 The Internet fuels comparisons and the growth of knowledge and provision of information on which to base choices. Globally, consumers expect that the services they engage with, contract to and purchase will not only be consistent in quality, durability and ease of use, but also safe, environmentally friendly and fair for the communities affected by the services.

0.6 Although all people have a right of access to services, this will not always be relevant or feasible. However, it is advisable that service providers consider the needs of all potential users, including children and those from different cultural and ethnic heritages. This will enable the services to be available to as many people as possible. The issue of accessibility and usability of products and services has become more critical with the increasing percentage of older persons in the world's population. While not all older persons have disabilities, the prevalence of disability or limitations is highest among this demographic group.

0.7 The standardization of services can provide the following benefits:

- build consumer confidence by assuring safety, security, quality, durability and ease of use;
- supply accurate and appropriate information and take into account user requirements;
- support the development of choice and access to a wide range of users;
- provide appropriate and fair forms of redress, where necessary.

0.8 Many national and sectoral codes of practice exist in relation to parts of service delivery which can be considered when developing standards. However, these are most commonly drawn up from the viewpoint of the service provider and are thus not necessarily those of the consumer. This Guide seeks to ensure that consumer needs are addressed. It also allows a common set of criteria for services across countries in which there can be many differences in the scope and application of national consumer protection legislation.

0.9 It is recognized that when developing service standards, it is advisable to take account of applicable statutory or regulatory requirements.

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Development of service standards — Recommendations for addressing consumer issues

1 Scope

This Guide provides general guidance on the issues to be considered in standards for services. On the basis of this guidance, detailed standards can be prepared for any service. This Guide provides a checklist (see Clause 9) which can be used by consumer representatives and others participating in the process of standards development. Use of the checklist enables full consideration to be given to all matters of consumer interest, including the needs of children, older persons, persons with disabilities and those from different ethnic and cultural heritages.

This Guide is relevant to the full range of services, whether or not a formal contract is entered into or purchase price paid, but it also has relevance for public or charitable services in which there is a consumer, a user or a participant, but not necessarily a purchase, e.g. education, health and care provision.

2 Normative references

The following referenced documents are indispensable for the application of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 9000, *Quality management systems — Fundamentals and vocabulary*

3 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 9000 and the following apply.

3.1

service

result of at least one activity, necessarily performed at the interface between the supplier and customer, that is generally intangible

NOTE 1 Examples of possible services are given in Annex A.

NOTE 2 In ISO 9000, “product” is defined as the “result of a process” that encompasses four generic product categories [services (e.g. transport), software (e.g. computer program, dictionary), hardware (e.g. engine mechanical part) and processed materials (e.g. lubricant)] and that indicates that the product category used is based on the dominant element. A service can therefore include the delivery of software, hardware and processed materials. For the purposes of this Guide, a separate definition of “service” is given here.

**3.2
goods**

products excluding services

EXAMPLE Software, hardware and processed materials, e.g. domestic appliances, home care articles, food.

NOTE In ISO 9000, "product" is defined as the "result of a process" that encompasses four generic product categories [services (e.g. transport), software (e.g. computer program, dictionary), hardware (e.g. engine mechanical part) and processed materials (e.g. lubricant)] and that indicates that the product category used is based on the dominant element. A service can therefore include the delivery of software, hardware and processed materials. For the purposes of this Guide, a separate definition of "goods" is given here.

**3.3
service provider**

entity that offers one or more services

NOTE The entity can be an individual or an organization.

**3.4
consumer**

individual member of the general public purchasing or using goods, property or services, for personal, family or household purposes

NOTE Adapted from the ISO/IEC Statement on *Consumer participation in standardization work* [26].

**3.5
customer**

organization or person that receives a product

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EXAMPLE Consumer, client, end-user, retainer, beneficiary or purchaser.

NOTE 1 For the purposes of this Guide, use of the term "customer" includes potential customers in the reference.

NOTE 2 Adapted from ISO 9000.

**3.6
customer satisfaction**

customer's perception of the degree to which the customer's requirements have been fulfilled

NOTE 1 Customer complaints are a common indicator of low customer satisfaction, but their absence does not necessarily imply high customer satisfaction.

NOTE 2 Even when customer requirements have been agreed to with the customer and fulfilled, this does not necessarily ensure high customer satisfaction.

NOTE 3 Adapted from ISO 9000.

**3.7
user
participant**

person who uses the service(s) of the service provider

**3.8
impairment**

problem in body function or structure such as a significant deviation or loss which can be temporary due, for example, to injury, or permanent, slight or severe and can fluctuate over time, in particular, deterioration due to ageing

[ISO/IEC Guide 71:2001, 3.4]

3.9**contract**

agreement by which one or more parties are obligated towards one or several other parties to provide a service

3.10**code of conduct**

customer promise(s) made by an organization, and related provisions

NOTE 1 The promise(s) are used by the organization for the purpose of maintaining and enhancing **customer satisfaction** (3.6) and relate to the organization's products or the interaction of the organization with its existing or potential customers.

NOTE 2 See also ISO 10001 on guidelines for codes of conduct for organizations.

3.11**customer service**

interaction of an organization with the customer throughout the phases of service provision

NOTE Adapted from ISO 10002.

3.12**delivery**

action of providing a service

3.13**usability**

extent to which a service can be used by specified users to achieve specified goals with effectiveness, efficiency and satisfaction in a specified context of use

[ISO/IEC Guide 71:2001, 3.7]

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3.14**assistive technology****assistive device**

piece of equipment, product system, hardware, software or service that is used to increase, maintain or improve functional capabilities of individuals with disabilities

NOTE This can be acquired commercially off-the-shelf, modified or customized. The term includes technical aids for persons with disabilities. Assistive devices do not eliminate an impairment but may lessen the difficulty an individual has in carrying out a task or activity in specific environments.

[ISO/IEC Guide 71:2001, 3.3]

3.15**alternative format**

different presentation which can make services accessible by the use of another movement or sensory ability

NOTE Adapted from ISO/IEC Guide 71.

3.16**complaint**

expression of dissatisfaction made to an organization, related to its products, or the complaints-handling process itself, where a response or resolution is explicitly or implicitly expected

[ISO 10002:2004, 3.2]

3.17

complainant

person, organization or its representative, making a complaint

[ISO 10002:2004, 3.1]

3.18

feedback

opinions, comments and expressions of interest in the service or the complaints-handling process

NOTE Adapted from ISO 10002 and from ISO/IEC Guide 51.

3.19

safeguard

precaution taken to prevent or reduce the impact of a failure in some aspect of service provision

4 Key consumer principles

4.1 General

Services cover a wide range of activities (see Annex A). The common features are a service provided by a commercial, public or private organization, for which claims are made, products or assistance are delivered, an organization on whose quality of provision consumers rely, often without individual or immediate means to judge this. The key consumer principles, as described in subclauses 4.2 to 4.10, should be taken into account.

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4.2 Information

Information and its communication play a crucial role in the selection, provision and effective use of services because, unlike products such as shoes and food, there are less tangible elements to assist the consumer in gauging quality, fitness for purpose, value for money, etc. Communication of information, especially prior to contract signature, and the manner of doing it (including the attitude of staff) is a fundamental consideration. The role of communication at every step in the decision-making process is illustrated in Figure 1.

4.3 Access and fairness

Access to services is a function of consumers' ability to afford the things they need or want, and of the availability of these things to all consumers regardless of location, social and economic considerations and physical or mental impairment. Thus, to be credible, the interests of the full range of consumers (from children to older persons, with different cultural and ethnic backgrounds and with all variations in abilities) should be acknowledged and included from the outset in the development of relevant standards. In maintaining the principle of fairness, standards should ensure that services do not unreasonably discriminate against any particular group of consumers.

4.4 Choice

Promoting consumer choice is fundamental to consumer policy. In standardization, this means that a standard should not favour any one particular supplier or be unnecessarily restrictive of the form of service provision. Various characteristics of a service will be balanced with the need to maintain value for money and a competitive market.

4.5 Safety and security

The safety (including hygiene and physical safety) and security (including financial security and privacy) afforded by services are key priorities, with a particular emphasis on protecting vulnerable people, e.g. children, older persons, persons with disabilities or persons disadvantaged through poverty or an inability (perhaps due to language) to access relevant information and assistance.

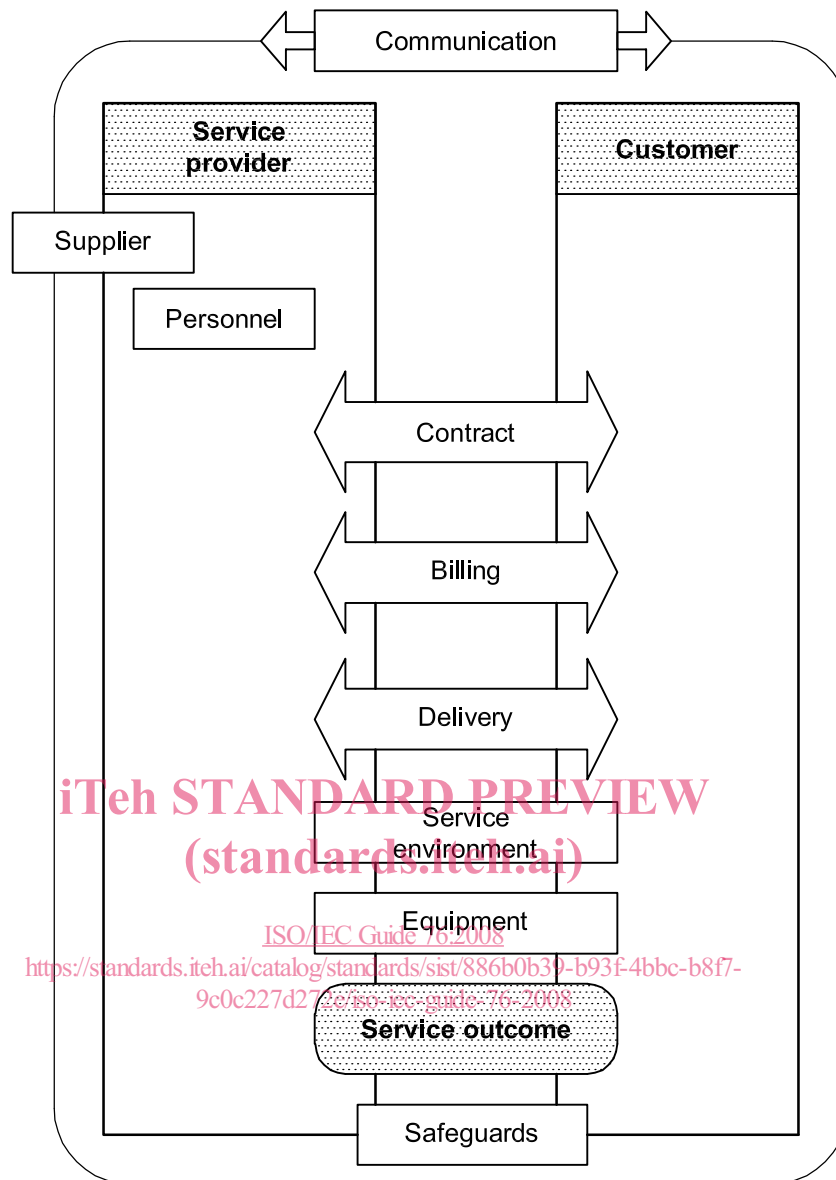


Figure 1 — Service elements and role of communication at all stages of service provision

4.6 Quality

Quality is the extent to which the characteristics of a service fulfil the requirements. Therefore, quality encompasses the many other intangible features that contribute to “good” service. These include factors already considered in subclauses 4.2 to 4.5, such as access to helpful and accurate information, good customer handling and timely provision, but also factors within a framework of environmental impact assessment and sustainable development, such as sustainable use of resources and the ability to recycle. Ease of use is a quality feature for the general populace, but also an access factor for those with some form of impairment. Quality and value for money, as well as safety, are central issues for consumers.

4.7 Redress

Consumers need to feel confident of service delivery and of the fact that, should something go wrong, there are appropriate provisions in place to handle any concerns or claims, irrespective of whether the service is provided nationally or from another country.

4.8 Environmental issues

Environmental considerations are of increasing importance to consumers and may affect their decision-making. Factors include promoting respect for the natural and human environment through reduction of waste, odours, noise and visual pollution, and conservation of the physical, cultural and human heritage.

4.9 Representation

Standards development organizations should ensure that consumers are represented in all technical committees or working groups where the subject matter has an effect on consumers. If this is not feasible, they should use other ways to ensure that consumer interests are taken into account, e.g. through consultation. Where appropriate, the standards themselves should make provision for consumer representation, e.g. through consultation when developing new services.

4.10 Compliance with laws and regulations

Service providers should ensure compliance and proper consideration of applicable statutory and regulatory requirements, from the earliest planning and design stages of the service to service delivery and redress.

5 Using this Guide

5.1 This Guide provides an overview on how consumer interests should be identified and taken into account in the development of standards for services. Standards include international, regional and national standards, as well as sectoral and organizational or company standards. This Guide indicates the areas in which detailed requirements may be drawn up for particular sector-specific standards.

5.2 The documents listed below should all form part of the toolkit for the standards developer.

- a) The ISO/IEC Policy Statement, *Addressing the needs of older persons and people with disabilities in standardization work*^[24], and the complementary guide, ISO/IEC Guide 71, provide standards developers and others with a systematic approach to addressing ageing and disability issues in the writing and revision of International Standards. These documents also help Technical Committees to evaluate how they are addressing such issues in their Work Programmes.
- b) ISO/IEC Guide 51 provides guidance on general safety considerations. ISO/IEC Guide 50 provides more specific guidelines for child safety.
- c) Detailed guidance on specific aspects of service delivery, such as the internationally agreed criteria for customer satisfaction given in ISO 10001, ISO 10002 and ISO 10003, constitutes useful guidance on global customer care.

NOTE ISO 10001 provides guidelines on codes of conduct; ISO 10002 provides guidelines on complaints handling; ISO 10003 provides guidelines on external customer dispute resolution.

5.3 Clause 6 outlines a process which standards developers may use to address the key areas of consumer interest, including the needs of older persons and persons with disabilities.

5.4 Clause 7 identifies the key consumer questions that may be asked when selecting, purchasing or engaging with a service, and indicates the link with the various "service elements" listed in Table 1.

5.5 The service elements, identified from the key consumer questions, may be considered when developing organizational or company standards, or sector-specific standards. Within each service element, there are a number of "topic areas". Clause 8 describes the various topic areas for each service element. Taking all topic areas into account should ensure that consumers' needs are addressed when developing a standard. In the delivery of any service, there may be a sequence of phases in the provision of the service, all involving interaction between the service provider and customer.

NOTE See Figure 2 for an example related to a sporting event; this figure also shows that there can be associated support activities.

5.6 In Clause 9, Tables 2 to 6 provide checklists of the topic areas identified in Clause 8 as a quick way of enabling standards developers to ensure that all relevant aspects are covered.

5.7 Annex B illustrates how different service elements may assume greater or lesser significance when this systematic checklist approach is used to develop standards in very different service sectors (i.e. hair care providers, hotels and life insurance).

NOTE Annex B gives examples rather than exhaustive lists of all necessary requirements for each of these services.

5.8 The Bibliography provides a list of sources that standards developers can use to investigate more detailed and specific guidance materials.¹⁾

5.9 In developing a new service standard, the expectation should be to identify the criteria required to ensure best practice, regardless of the size or location of the service provider. However, the more complex the service, the more optional features there may be to consider. To facilitate the use of standards by even the smallest organization, it is recommended that issues of overriding importance for the particular service being standardized should be identified by means of checklists, from which should be formulated a set of the key criteria with which a small organization should comply. This may be included as an annex (e.g. Annex A of ISO 10002:2004).

Figure 2 illustrates the provision of services by a professional soccer club, where the spectator is the customer²⁾. Several services may be offered during each phase of the experience. For example, during half-time, music may be played, spectators may buy a drink or snack, or go to the toilet. Support activities include other provision for the same customers, but not directly related to the match, e.g. selling club articles or issuing a magazine. All of these activities need to be planned for and done well if the resulting service is to provide customer satisfaction.

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1) The Bibliography is not exhaustive. Users are encouraged to check for current updates and future publications and investigate websites for further material.

2) Based on "ISO 9000 scores in professional soccer – but who is the customer?"^[27].