INTERNATIONAL STANDARD

ISO 10008

Quality management — Customer satisfaction — Guidelines for business-to-consumer electronic commerce transactions

Management de la qualité — Satisfaction client — Lignes directrices pour les transactions de commerce électronique entre commerçant et consommateur

iTeh STANDARD PREVIEW
(standards.iteh.ai)

ISO 10008:2013
https://standards.iteh.ai/catalog/standards/sist/4f3424ea-8c66-44f5-8da5-
e9d97e6228ab/iso-10008-2013

Contents

Page

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.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2. www.iso.org/directives

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. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received. www.iso.org/patents

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

The committee responsible for this document is ISO/TC 176, *Quality management and quality assurance*, Subcommittee SC 3, *Supporting technologies*.

Introduction

0.1 General

This International Standard provides guidance to organizations for planning, designing, developing, implementing, maintaining and improving an effective and efficient system concerning business-to-consumer electronic commerce transactions.

An effective and efficient business-to-consumer electronic commerce transaction (B2C ECT) system can assist consumers and organizations in addressing all aspects of a transaction.

This International Standard gives guidance on how organizations can implement such a B2C ECT system and thereby:

a)   provide a basis for consumers to have increased confidence in B2C ECTs;

b)   enhance the ability of organizations to satisfy consumers;

c)   help reduce complaints and disputes.

A B2C ECT involves internet interactions between the organization and the consumer, when accessed by the consumer through any device with wired or wireless connectivity (e.g. personal computers, e-tablets, personal digital assistants and internet-enabled cell phones). For the purposes of this International Standard, a B2C ECT can also involve other data-based telecommunications networks (e.g. short-text messaging) and various interfaces, including websites, social media web pages and e-mails.

The guidance in this International Standard is intended to apply to situations where a substantial part of the B2C ECT, including at least one in-transaction phase process (see 5.3), is facilitated by electronic methods (e.g. processing of payment, confirmation by the consumer of the agreement, or delivery of a product).

The guidance in this International Standard could be useful for situations where no B2C ECT takes place, but there is some online interaction between the organization and the consumer, such as when an organization advertises online and does not sell products online.

Where distance selling does not include an online component, e.g. a mail order, it is not the subject of this International Standard, but some of the guidance provided could be relevant.

The guidance in this International Standard is not intended to apply to online transactions completed between individuals ("consumer-to-consumer"). However, the guidance in this International Standard could be relevant to third party organizations that provide online services to facilitate consumer-to-consumer transactions (e.g. auction websites).

0.2 Relationship with ISO 9001 and ISO 9004

This International Standard is compatible with ISO 9001 and ISO 9004 and supports the objectives of these two standards through the effective and efficient application of a B2C ECT system.

ISO 9001 specifies requirements for a quality management system that can be used for internal application by organizations, or for certification, or for contractual purposes. A B2C ECT system implemented in accordance with this International Standard (ISO 10008) can be an element of a quality management system. ISO 9004 provides guidance on quality management for the sustained success of organizations. This International Standard (ISO 10008) can support sustained success in the context of B2C ECTs.

0.3 Relationship with ISO 10001, ISO 10002, ISO 10003 and ISO 10004

This International Standard is designed to be compatible with ISO 10001, ISO 10002, ISO 10003 and ISO 10004. These five standards can be used either independently or in conjunction with each other. When used together, the standards can be part of a broader and integrated framework for enhanced customer satisfaction in both the B2C and non-B2C contexts.

Organizations can use the guidance contained in ISO 10001 to plan, design, develop, implement, maintain and improve a B2C ECT code as part of the B2C ECT system. The complaints handling, dispute resolution and customer satisfaction monitoring and measuring processes described in ISO 10002, ISO 10003 and ISO 10004, respectively, can form important parts of a B2C ECT system.

iTeh STANDARD PREVIEW
(standards.iteh.ai)

ISO 10008:2013
https://standards.iteh.ai/catalog/standards/sist/4f3424ea-8c66-44f5-8da5-
e9d97e6228ab/iso-10008-2013

Quality management — Customer satisfaction — Guidelines for business-to-consumer electronic commerce transactions

1 Scope

This International Standard provides guidance for planning, designing, developing, implementing, maintaining and improving an effective and efficient business-to-consumer electronic commerce transaction (B2C ECT) system within an organization.

It is applicable to any organization engaged in, or planning to be engaged in, a business-to-consumer electronic commerce transaction, regardless of size, type and activity.

This International Standard is not intended to form part of a consumer contract or to change any rights or obligations provided by applicable statutory and regulatory requirements.

This International Standard aims to enable organizations to set up a fair, effective, efficient, transparent and secure B2C ECT system, in order to enhance consumers' confidence in B2C ECTs and increase the satisfaction of consumers. It is aimed at B2C ECTs concerning consumers as a sub-set of customers.

The guidance given in this International Standard can complement an organization's quality management system.

2 Normative references

The following documents, in whole or in part, are normatively referenced in this document and are indispensable for its application. 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 International Standard, the terms and definitions given in ISO 9000 and the following apply.

3.1
business-to-consumer electronic commerce transaction
B2C ECT
set of interactions between an *organization* (3.2) and a *consumer* (3.3) for the provision of a *product* (3.4) facilitated online

3.2
organization
person or group of people that has its own functions, with responsibilities, authorities and relationships to achieve its objectives

EXAMPLE   Company, corporation, firm, enterprise, institution, charity, sole trader, association, or parts or combination thereof.

3.3
consumer
individual member of the general public, purchasing or using *products* (3.4) for personal, family or household purposes

Note 1 to entry: For the purposes of this International Standard, the term "consumer" includes potential consumers.

[SOURCE: ISO/IEC Guide 76:2008, 3.4, modified — The phrase "goods, property or services" has been replaced by "products" and the Note has been deleted.]

3.4
product
result of a process

Note 1 to entry: There are four generic product categories: services (e.g. transport); software (e.g. computer program, dictionary); hardware (e.g. engine mechanical part); processed materials (e.g. lubricant).

Many products comprise elements belonging to different generic product categories. Whether the product is then called service, software, hardware or processed material depends on the dominant element. For example, the offered product "automobile" consists of hardware (e.g. tyres), processed materials (e.g. fuel, cooling liquid), software (e.g. engine control software, driver's manual) and service (e.g. operating explanations given by the salesman).

Note 2 to entry: In this International Standard, the term "product" refers to products intended for, but not limited to, personal, family or household use, and can include consumer products. This could differ from the definition of the term "product" in other ISO standards.

3.5
B2C ECT code
promise or set of promises made by *organizations* (3.2) to *consumers* (3.3), and related provisions in support of B2C ECTs

3.6
B2C ECT provider
person or *organization* (3.2) that supplies a *B2C ECT* (3.1) process or activity and that is external to the organization operating the B2C ECT system

4   Guiding principles

4.1   General

Effective and efficient planning, design, development, implementation, maintenance and improvement of an organization's B2C ECT system is based on adherence to the consumer-focused guiding principles set out in 4.2 to 4.17. These guiding principles can assist in enhancing consumer protection throughout the B2C ECT system.

NOTE   Annex A provides further guidance on customer satisfaction and consumer needs in the B2C ECT context.

4.2   Commitment

An organization should be actively committed to the adoption, integration and dissemination of a B2C ECT system, including the fulfilment of the promises that it is making to consumers in its B2C ECT code.

4.3   Capacity

Sufficient resources should be made available for managing an organization's B2C ECT system, including its planning, design, development, implementation, maintenance and improvement.

4.4   Competence

Organization personnel and B2C ECT providers should have the attributes, knowledge, skills, training and experience necessary to discharge their responsibilities in a consumer-friendly manner.

4.5 Suitability

The organization should ensure that the B2C ECT system is appropriate for the type of transaction involved, taking into consideration such factors as the characteristics of the consumer, the type of product and the nature of any complaint or concern, as applicable.

4.6 Accuracy

An organization should ensure that its B2C ECT system and the information about it are adequate, current, accurate, not misleading, verifiable and in accordance with all applicable statutory and regulatory requirements.

4.7 Transparency

Sufficient information about the organization's B2C ECT system should be disclosed to consumers, personnel and other interested parties, and this information should be clearly visible.

4.8 Accessibility

An organization's B2C ECT system and the relevant information about it should be easy to find, understand and use.

NOTE   ISO Guide 76 provides further guidance on accessibility.

4.9 Responsiveness

In its B2C ECT system, an organization should respond to the needs of consumers. The organization's responses, including responses to any queries or complaints, should be provided quickly and efficiently, given the nature of the need and the process in question.

4.10 Consent

An organization should ensure that whenever consumer consent is required in a B2C ECT, it is given intentionally and based on full information.

4.11 Fairness

An organization should develop and implement a B2C ECT system that is fair for all consumers.

4.12 Accountability

An organization should establish and maintain accountability for, and reporting on, the actions and decisions with respect to its B2C ECT system, including with respect to its B2C ECT providers.

4.13 Legality

An organization should proactively monitor the relevant legislative environment and operate its B2C ECT system in accordance with all applicable statutory and regulatory requirements.

4.14 Privacy

Personal information about the consumer gathered by an organization in the application of its B2C ECT system should be kept confidential, and protected and treated in accordance with all applicable statutory and regulatory requirements. This includes limiting the use of personal information to those purposes for which explicit consent is obtained from the consumer. This also includes limiting disclosure of personal information to situations where it is required by applicable statutory and regulatory requirements, or, when permitted, to situations where explicit consent for disclosure is obtained from the consumer.

4.15 Security

The organization should preserve the confidentiality and integrity of consumer data in the B2C ECT system by security safeguards appropriate to the sensitivity of the information, and apply generally-accepted best practices to protect against unauthorized access.

4.16 Integration

An organization's B2C ECT system should be integrated with the organization's quality and other management systems, where appropriate. This should include online B2C ECT and conventional face-to-face or distance selling marketplace interactions, where applicable, in a way that is consistent and comprehensible to all consumers.

4.17 Improvement

The increased effectiveness and efficiency of the B2C ECT system should be a permanent objective of the organization.

5 Business-to-consumer electronic commerce transaction system

5.1 Framework

An organization should establish and apply a framework for decision-making and action in planning, design, development, implementation, maintenance and improvement of the B2C ECT system. This framework involves the resource assessment, provision and deployment needed to support the carrying out of the processes to achieve the objectives of the B2C ECT system. It also includes top management commitment, assignment of appropriate responsibilities and authorities, and training, in accordance with the guiding principles stated in Clause 4.

In planning, design, development, implementation, maintenance and improvement of its B2C ECT system, the organization should gather and assess information concerning:

— the needs and expectations of consumers;

— the issues associated with B2C ECTs (e.g. privacy, security, responsiveness and accuracy);

— statutory and regulatory requirements associated with dealing with these issues (see Annex B);

— how these issues arise, their potential effects, and how they are addressed;

— how other organizations are dealing with these issues.

It is important for the organization to obtain and assess the input from relevant interested parties (e.g. customers, providers, industry associations, consumer organizations, relevant government agencies, regulatory authorities, personnel and owners) concerning B2C ECTs.

5.2 Objectives

The organization should determine the objectives to be achieved by the B2C ECT system. These objectives should be consistent with the overall organizational objectives, and their fulfilment should be measurable using suitable performance indicators. These objectives should be reviewed at regular intervals and updated as necessary.

The organization should prepare quantitative and qualitative performance indicators designed to evaluate and assist in understanding whether the organization's B2C ECT system is successful in fulfilling its objectives.

NOTE   Examples of performance indicators relating to the B2C ECT system include:

— the number of successful finalized sales in relation to the visits of the website,

— the number of returns of successful deliveries in relation to the total,

— the number of returning consumers in relation to the total,

— loss and damage relative to total deliveries,

— the number of deliveries completed on time in relation to the total,

— the number of internal site/platform system failures,

— grading or ranking from surveys measuring the satisfaction of consumers,

— statistics regarding complaints and their resolution, and

— the timeliness of responses to feedback.

5.3   Processes

5.3.1   General

An organization should plan, design, develop, implement, maintain and improve:

a)   single-phase processes, and

b)   multi-phase processes.

A B2C ECT typically goes through three distinct phases:

— a pre-transaction phase,

— an in-transaction phase, and

— a post-transaction phase.

A single-phase process applies to only one of the three phases of the B2C ECT. For example, the final quote process is specific to the in-transaction phase.

A multi-phase process applies to all three phases. The relationship between processes is dynamic and should not be viewed in a strictly sequential way. For example, an organization can prepare a multi-phase process, such as establishing a B2C ECT code, prior to the preparation of pre-transaction, in-transaction and post-transaction phase processes.

Figure 1 illustrates these processes and the related activities.

The planning, design and development of each of these processes is integral to their successful implementation. The organization should test its B2C ECT system prior to implementation in order to determine the need for adjustments.

Guidance on planning, design, development and implementation of pre-transaction, in-transaction and post-transaction phase processes is provided in Clause 6.

Guidance on planning, design, development and implementation of multi-phase processes is provided in Clause 7. Guidance on maintenance and improvement of the B2C ECT system is provided in Clause 8.
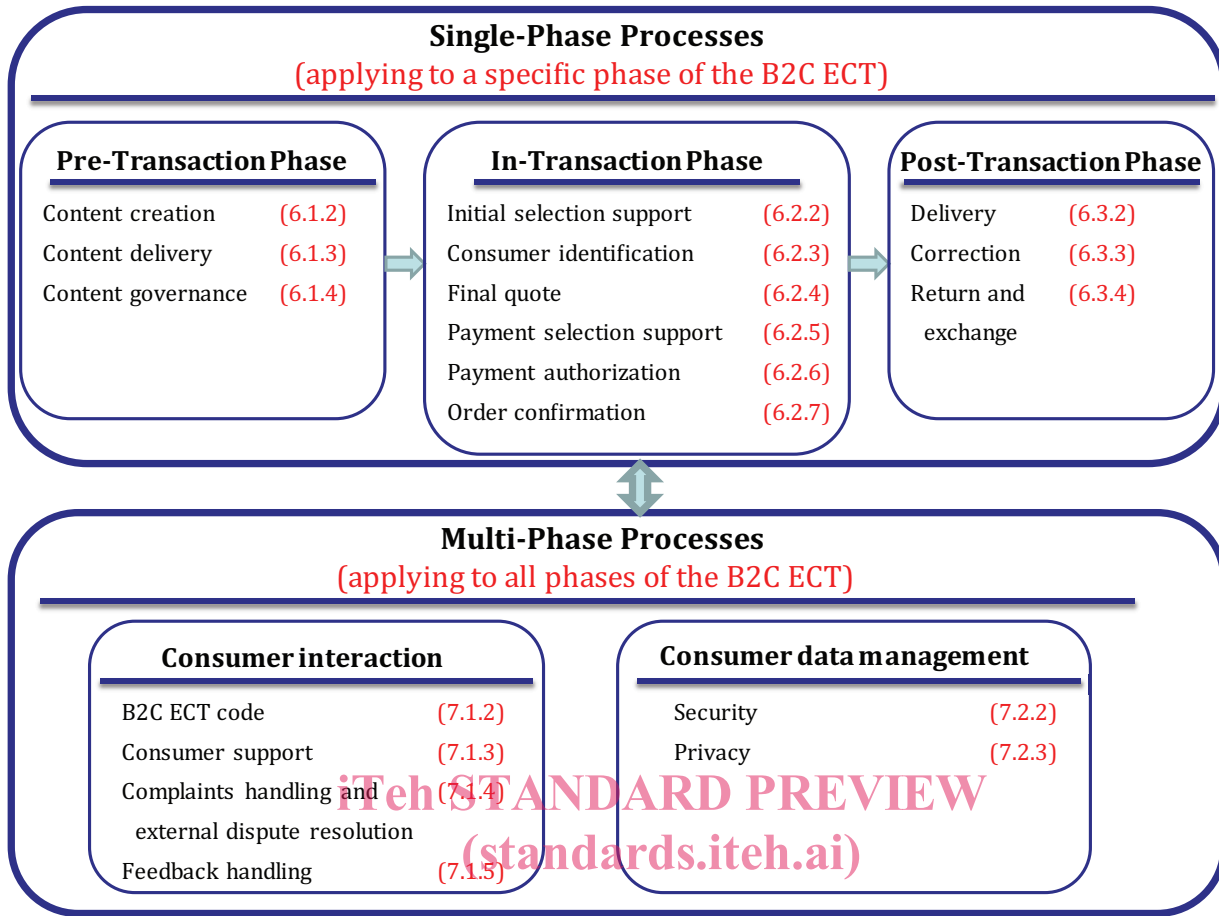
Figure 1 — Processes of the B2C ECT System

5.3.2 Single-phase processes

An organization should recognize the distinct activities and issues associated with the pre-transaction, in-transaction and post-transaction phases.

In the pre-transaction phase, the consumer is searching for information about an organization, its product and the B2C ECT system. An organization should support this phase by creating, delivering and governing content that meets such consumer needs for information.

The in-transaction phase involves product ordering, the acceptance of the terms of the contract, the transfer of value in exchange for a product, agreement concerning product delivery and recourse should problems arise.

In the post-transaction phase, all parties fulfil the obligations they have made as a part of the in-transaction phase. This phase involves the activities related to product delivery, options for adjustments to the original order or for returns, and maintenance of relevant on-going communications.

NOTE   In this International Standard, "content" refers to the wording, images and related mechanisms associated with communicating information about the organization, its products and the B2C ECT system.

5.3.3 Multi-phase processes

In the B2C ECT context, multi-phase processes apply to all three phases of the B2C ECT, and consist of consumer interaction processes and consumer data management processes.