INTERNATIONAL STANDARD

**ISO
18295-1**

Customer contact centres —

Part 1:
Requirements for customer contact centres

Centres de contact clients —

Partie 1: Exigences relatives aux centres de contact clients

iTeh STANDARD PREVIEW
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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.

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 (see 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 (see 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.

For an explanation on the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT) see the following URL: www.iso.org/iso/foreword.html

This document was prepared by ISO/PC 273, *Customer contact centres*.

A list of all the parts of ISO 18295 can be found on the ISO website.

Introduction

The ongoing success and development of any organization relies on its understanding of the expectation levels and perceptions of its customers. The results of specific consumer research by ISO's Consumer Policy Committee (COPOLCO) prompted an initial request to member bodies to assess the interest in a customer-focused contact centres standard.

Service standards are an important element of service management excellence; they help clarify expectations for clients and employees, enable performance management, and support client and customer satisfaction. This document specifies requirements and gives guidance for in-house (captive) contact centres and outsourced contact centres (third party providers). It is intended to be used for any customer interaction with a customer contact centre (CCC).

Implementation of this document and ISO 18295-2 can create value for the customer, the client, the employee and the CCC, improving the robustness and efficiency of the service and the client/CCC relationship, therefore enabling the CCC to deliver a higher level of customer experience on behalf of the client.

ISO 18295 comprises two parts (see Figure 1).

This document specifies requirements for customer contact centres (CCC) which are either in-house or managed by an outsourcer. It deals with certain aspects of products and services which remain the responsibility of the client organization, rather than the CCC.

ISO 18295-2 specifies requirements for the client organization that mandates the CCC (in-house CCC and/or the outsourcer). A CCC is not responsible for certain aspects of products and services which remain the responsibility of the client organization.

ISO 18295-2 aims to ensure that customer expectations are consistently met through the provision and management of appropriate arrangements with CCCs meeting the requirements of this document.
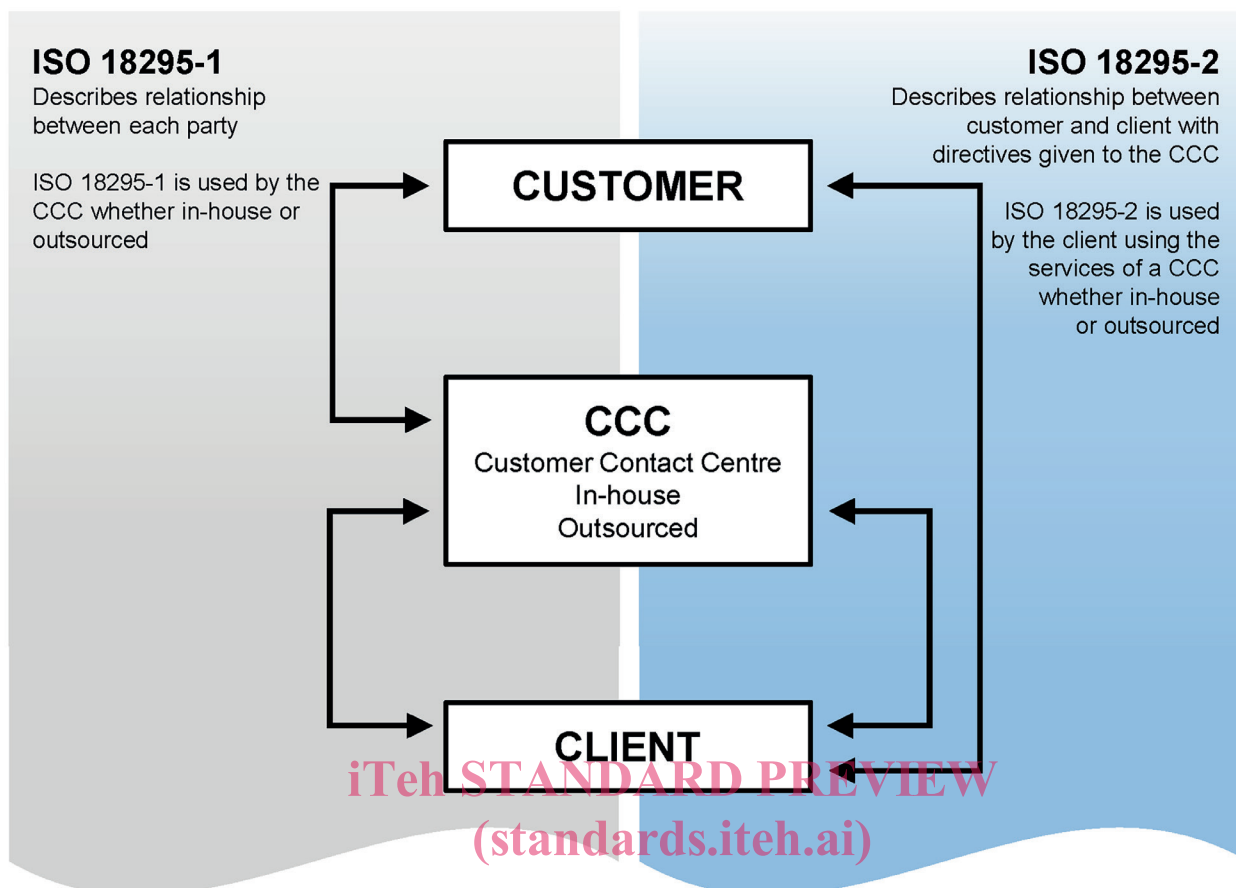
Figure 1 — Relationship between ISO 18295-1 and ISO 18295-2

Customer contact centres —

Part 1:
Requirements for customer contact centres

1 Scope

This document specifies service requirements for customer contact centres (CCC). It specifies a framework for any CCC that aims to assist in providing clients and customers with services that continuously and proactively meet or exceed their needs.

This document is applicable to both in-house (captive) and outsourced (third party operator) CCCs of all sizes, across all sectors and all interaction channels, including inbound and outbound. It specifies performance metrics (KPIs) as and where required.

2 Normative references

There are no normative references in this document.

3 Terms and definitions

For the purposes of this document the following terms and definitions apply.

ISO and IEC maintain terminological databases for use in standardization at the following addresses:

— ISO Online browsing platform: available at http://www.iso.org/obp

— IEC Electropedia: available at http://www.electropedia.org/

3.1
agent
CCC staff member who handles customer contacts

3.2
accessibility
usability of a product, service, environment or facility by people with the widest range of capabilities

3.3
campaign
set of custom-designed initiatives (interactions and activities) that target prospective or existing customers (or both) for desired outcomes

3.4
channel
means by which a customer is able to interact with a CCC

EXAMPLE   Web-chat, e-mail, voice.

3.5
client
organization which commissions the CCC to deliver customer interactions on its behalf

Note 1 to entry: A client can be part of the same organization as the CCC as well as an organization that outsources part or all of its CCC activities.

3.6
customer contact centre
CCC
in-house or outsourced organization which provides customer contact services, on behalf of a client organization, to their customers

3.7
customer
organization or person that receives a product or service

Note 1 to entry: A customer can be internal or external to the organization, existing or potential, e.g. consumer, end user, beneficiary or purchaser.

3.8
complaint
expression of dissatisfaction made to an organization, related to its products or service, or the complaints-handling process itself, where a response or resolution is explicitly or implicitly expected

[SOURCE: ISO 10002:2014, 3.2, modified]

Note 1 to entry: In this document complaints are related to CCC interactions and client product(s)/service(s).

3.9
inbound
<contact with the CCC> initiated by a customer

3.10
outbound
<contact with a customer> initiated by the CCC

4 Customer relationship requirements

4.1 General

Customers who interact with a CCC have a variety of needs. The CCC shall, on behalf of the client, deliver positive customer experiences which meet their customers' needs.

The CCC shall ensure that it is accessible, reliable and responsive to customer needs and that it handles all customer interactions consistently across its available communication channels.

4.2 Communication of information to customers

The CCC shall ensure that all information it provides to customers is accurate, relevant and easily understood. When communicating with customers, the CCC shall take into account and act appropriately in response to customers' communication needs, for example language, literacy and impairments. The CCC should consider where and in what format it presents information.

When the CCC cannot immediately resolve a query it shall provide the customer with appropriate information, for example:

a)   the estimated time-frame for a response/resolution;

b)   the department/role/function that will be responsible for response/resolution;

c)   regular status updates;

d)   an amended time-frame and action plan when delays are incurred.

4.3 Measuring and monitoring of customer experience

The CCC shall take action to understand the experience customers have when interacting with the CCC.

This should include overall customer satisfaction and satisfaction with how the agent handled their interaction. The CCC should ensure it understands the key reasons for these results.

The CCC can use a variety of methods to understand and monitor this, including:

a) the CCC's quality evaluation;

b) employee feedback;

c) customer feedback;

d) speech analytics;

e) complaints analysis;

f) social networks feedback;

g) customer recommendations.

The CCC shall agree with the client before undertaking any direct customer contact to gather their feedback.

NOTE   Guidance on monitoring and measuring can be found in ISO 10004.

4.4 Complaints handling

The CCC shall establish an effective and efficient process for handling complaints about the CCC and about client-related product(s)/service(s).

The CCC and the client shall agree the conditions under which the complaints handling process is to be applied.

The CCC shall provide customers with clear and readily available information about where and how to complain, and about how complaints are handled.

The CCC shall acknowledge all complaints. The CCC shall ensure that all complaints, as defined by the CCC and the client, are:

a) logged and categorized correctly;

b) investigated and acted on within the set resolution time-frames, which are communicated at regular intervals;

c) escalated, when necessary, within the set time-frames;

d) closed with appropriate feedback provided to the customer on the resolution and outcome achieved.

The CCC shall use information from complaints to improve service delivery.

NOTE   Guidance on complaints handling can be found in ISO 10002.

4.5 Customer protection

The CCC shall ensure that the identity of the client is made clear in each interaction (unless the identity of the client could influence the purpose of the interaction e.g. market research).

The CCC shall ensure that agents only share confidential information with the correct customer.

The CCC shall proactively provide customers with clear information about any increased charges they could incur when interacting with the CCC. The CCC shall not conceal any charges.

The CCC shall ensure it deals with all customers ethically. It shall provide clear information about any financial, legal and contractual implications of decisions customers make related to interactions with the CCC.

The CCC shall not use pressure selling tactics and shall not exploit customers. It shall not disguise sales/marketing interactions as market research.

The CCC shall protect the privacy of customers, their information and data.

The CCC shall ensure that for outbound interactions:

a) it follows national or local 'do not contact' rules and legislation and any opt-out requests;

b) it advises the client to remove the customer details from the database when a customer requests to be removed from the database;

c) it minimizes abandoned contacts by a dialler;

d) the correct customer has been contacted and gives them an option to continue the interaction;

e) it gives the purpose of the contact at the beginning of the interaction;

f) it terminates a contact the customer does not want, and does not contact the customer again;

g) it makes telephone contacts within nationally accepted time-frames, except where the customer has requested a different contact time (within agreed operating hours).

Waiting times/queueing should be free of charge for the customer.

5 Customer-focused leadership

5.1 General

The CCC leadership shall take overall responsibility for implementing the requirements of this document and the customer experience strategy of the client. It shall establish customer-focused strategies that will result in positive experiences for customers when they interact with the CCC.

5.2 Customer experience design and delivery

The CCC leadership shall, in consultation with the client, determine the desired customer experience to be delivered by the CCC. The CCC leadership is responsible for delivering the desired experience through the CCC.

The CCC leadership and the client shall agree relevant performance measures for the CCC to monitor its performance and support it in delivering the desired customer experience (see Annex A). It shall agree with the client review frequencies for these measures.

5.3 Employee satisfaction/engagement

Employee satisfaction/engagement directly impacts customer satisfaction, therefore the CCC leadership shall create a working environment which encourages high levels of employee engagement. The CCC shall equip its employees with the skills and resources needed to deliver the desired customer experience.

The CCC shall integrate employee engagement in relevant CCC activities. It shall periodically measure employee satisfaction/engagement to understand employee needs and take action to improve as necessary. This shall focus on:

a) overall employee satisfaction/engagement (see A.2, metric 9);

b) agent experience in handling customer interactions.

6   Human resources

6.1   General

The CCC shall provide and schedule the right staff with the right competencies at the right time across interaction channels to fulfil the requirements defined with the client. It shall also provide a suitable work environment (see 8.4) in order to deliver the desired customer experience.

6.2   Functions

The CCC shall specify the requirements for all role functions. It shall ensure that all employees understand the performance requirements of their role.

The CCC shall be supported by the following functions and shall ensure that those who deliver these functions are competent to do so:

a) leadership;

b) human resource activities (recruitment, retention, employee satisfaction / engagement, well-being etc.);

c) skills development;

d) support systems - information, communication and technology management etc.;

e) quality assurance;

f) CCC operations management;

g) client relationship management;

h) compliance - knowledge of relevant legislation and regulation, including customer rights and data protection;

i) capacity management - workforce planning, scheduling and monitoring;

j) CCC management information systems and reporting;

k) subject matter expertise related to the CCC service offering;

l) product/service knowledge and content management.

6.3   Agent competencies

6.3.1   General

The CCC shall ensure that agents are only assigned to deal with interaction types for which they are suitably competent.

The CCC shall ensure that agents have the following competencies and behaviour and have an understanding of the performance requirements of their role in order to handle customer interactions.