
Customer contact centres —

Part 2:

Requirements for clients using the services of customer contact centres

Centres de contact clients —

*Partie 2: Exigences relatives aux donneurs d'ordre faisant appel aux
services de centres de contact clients*

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ISO copyright office
Ch. de Blandonnet 8 • CP 401
CH-1214 Vernier, Geneva, Switzerland
Tel. +41 22 749 01 11
Fax +41 22 749 09 47
copyright@iso.org
www.iso.org

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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 using the services of in-house (captive) centres and outsourcers (third party providers) on behalf of customers. It is intended to be used for any customer interaction with a Customer Contact Centre (CCC).

Implementation of this document and ISO 18295-1 can create value for the customer, the client, the employee and the CCC, improving the robustness and efficiency of service, 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 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.

This document 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.

ISO 18295-1 specifies requirements for CCCs 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 organisation, rather than the CCC.

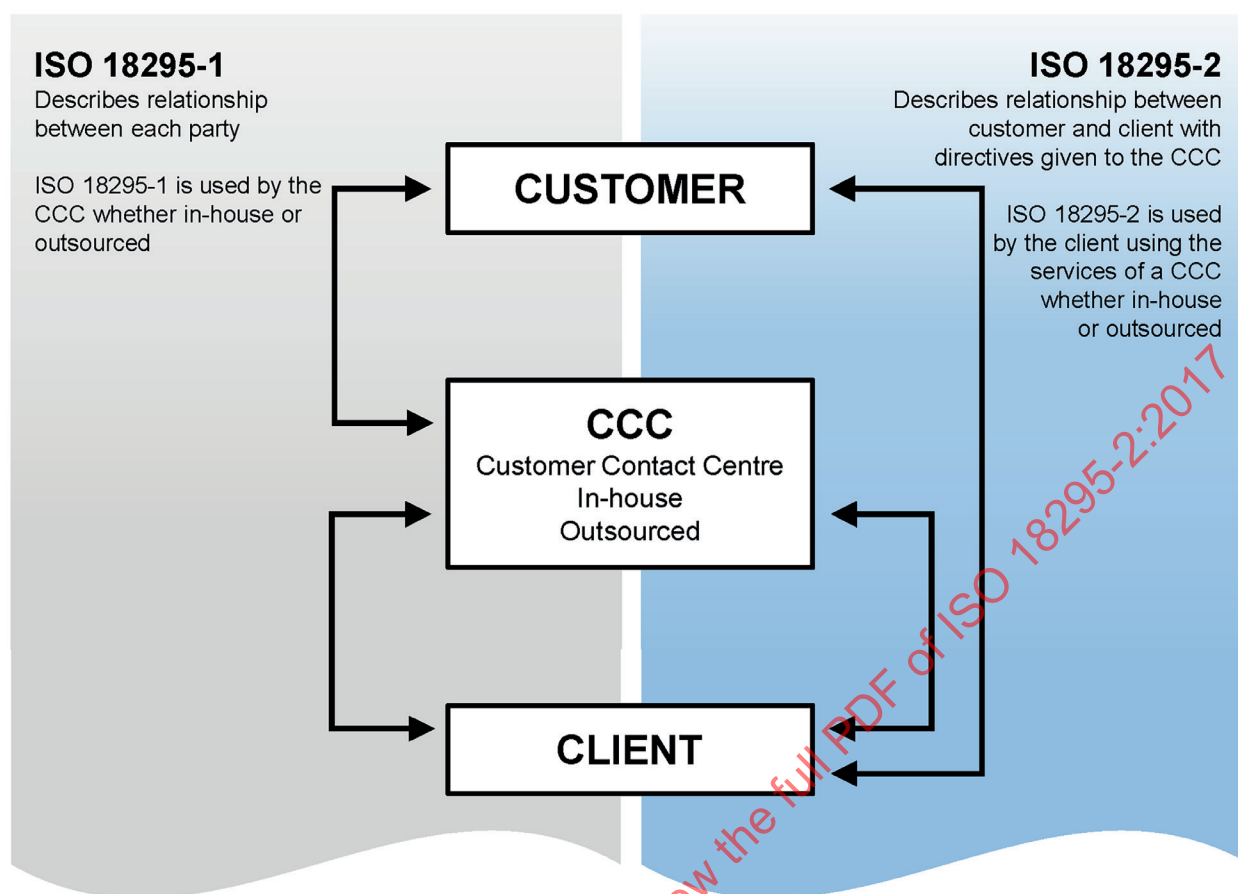


Figure 1 — Relationship between ISO 18295-1 and ISO 18295-2

Customer contact centres —

Part 2:

Requirements for clients using the services of customer contact centres

1 Scope

This document specifies requirements for organizations using the services of customer contact centres (CCC). It aims to ensure that customer expectations are consistently met through the provision and management of appropriate arrangements with CCCs meeting the requirements of ISO 18295-1.

This document is applicable to clients using CCCs of all sizes, across all sectors including in-house (captive) centres and outsourced (third party operator) centres, across multiple contact channels, including voice and non-voice media.

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements 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 18295-1, *Customer contact centres — Part 1: Requirements for customer contact centres*

3 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 18295-1 and the following 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

customer

organization or person that receives a product or service

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

Note 2 to entry: For the purposes of this document, the term “customer” includes potential customers.

[SOURCE: ISO 18295-1:2017, definition 3.7, modified - Note 2 to entry has been added.]

4 Client requirements for CCC service provisioning

A client engages the services of a CCC in order to provide its customers with a positive customer experience. At times it is necessary for the brand promise and marketing campaigns to be known to the CCC. To achieve this, the client shall:

- a) identify the needs and expectations of its customers (see 5.2);

- b) determine the experience they want customers to have when interacting with the CCC;
- c) ensure the CCC is clear about those needs and desired experience;
- d) ensure the CCC has the required resources to deliver the relevant customer service;
- e) strive to develop a positive and effective relationship with the CCC and its staff.

In order to comply with this document, the client shall make use of a CCC that complies with ISO 18295-1.

5 Customer experience

5.1 General

The client shall provide the CCC with information about its customers, their needs and the desired CCC customer experience, so that the CCC can be appropriately equipped and resourced to deliver the desired experience.

5.2 Identifying customers' needs

The client shall identify its customers and their needs and expectations so it can design an appropriate CCC service. The client shall consider the following:

- a) accessibility for all customers, internal and external, including where relevant, children, older people, those with different abilities and the vulnerable;
- b) language, location and time zone;
- c) preferred interaction channels;
- d) context of the customers' needs and expectations e.g. complexity, potential impact, severity;
- e) confidentiality, privacy and data security.

Based on a) to e), the client shall agree with the CCC the channels to be used and the resources and competencies needed by the CCC.

5.3 Customer experience strategy

The client shall create and document a customer experience strategy. In this strategy the client shall define the experience they want customers to have when interacting with the CCC, outlining the purpose of the CCC's service delivery.

The following should be considered when creating the strategy:

- a) communication objectives;
- b) brand management;
- c) accessibility;
- d) key stakeholders – internal, external, regulatory bodies etc.

5.4 Customer access and contact strategy

The client shall design and document a customer access and contact strategy that defines the communication channels and operating hours that the CCC shall deliver.

The client shall ensure that contact details of the CCC dealing with complaints and service enquiries are available and easy for customers to find.

All material providing contact information of the CCC shall indicate clearly which channels are available, at what times and for what interactions. It should also include any limitations on accessibility and provide alternate options where available.

The client shall ensure that navigation within a CCC's automated response system is user friendly and relevant.

Customers calling the CCC shall be given an option to break out to an agent at an early stage. This shall be within the first three levels and then on each subsequent level.

For inbound interactions, the client shall:

- a) agree Service Level (SL) with the CCC, taking into account customer wait tolerance times across required channels;
- b) ensure that the CCC is resourced to meet the SL;
- c) ensure that the CCC acknowledges receipt of digital interactions in an appropriate amount of time.

Best practice recommendation is for customers to be connected to an agent within 1 min of joining the queue, after the Interactive Voice Response system (IVR), or to provide an option for the customer to request a call-back.

5.5 Customer costs

The client shall ensure that all material containing CCC contact information clearly indicates any additional costs the customer will incur for using the CCC, whether charged by the client or the CCC.

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

5.6 Consistency of information

The client shall ensure that all information provided across all CCCs and channels is consistent and tailored to the channel type.

5.7 Customer protection

The client shall ensure that any sales contacts initiated by the CCC are not disguised, for example, as a survey.

The client shall ensure that the CCC observes opt-in and opt-out lists and there is a process to identify applicable national rules and legislation.

The client shall ensure that all customer contact lists it provides to the CCC or that are obtained by the CCC have accurate data which is up to date. The client shall remove customer details from the database when informed to do so by the CCC.

5.8 Ethical behaviour

The client shall ensure that the CCC acts ethically by:

- a) contacting customers only at reasonable times;
- b) ending contacts when it becomes apparent that the recipient is not capable of understanding the full implications of the offer;
- c) terminating the contact and making no further contacts when customers have clearly indicated that they are not interested.

The client shall ensure that the CCC provides customers with information about available channels for post-purchase service prior to concluding any sale.

The client shall ensure that customers receive written confirmation of all financial commitments.

5.9 Customer data

The client shall ensure that the CCC handles, stores and retrieves all customer data in a secure, access controlled and monitored environment.

The client shall ensure that customer data is only used for the specific purposes agreed with the CCC. Customer data shall be kept private and only shared with authorized parties. The client shall verify that the CCC deletes data that is no longer required.

6 Client relationship with the CCC

6.1 General

A client engages the services of a CCC in order to provide its customers with an accessible and consistently high level of customer experience.

6.2 Customer experience strategy

The client shall ensure that it communicates its customer experience strategy, as defined in [5.3](#), to the CCC and that the CCC fully understands it.

6.3 Customer access and contact strategy

The client shall ensure that it communicates its customer access and contact strategy, as defined in [5.4](#), to the CCC and that the CCC fully understands it.

6.4 Roles and responsibilities

The client shall agree with the CCC the roles and responsibilities of each party.

6.5 Communication of information to the CCC

The client shall provide the CCC with all relevant product and service information to enable the CCC to deliver the desired experience. The client shall keep this information accurate and up to date and shall inform the CCC of any changes.

The client shall ensure it gives the CCC sufficient time and information to equip the CCC and its agents with the competencies needed to deal with customer needs. This includes product, service, system and process information.

6.6 Operational processes

The client shall establish and document operational processes with the CCC. Where the client is involved in resolving customers' needs, as identified in [5.2](#), it shall provide appropriate resources and timely responses.

The client shall ensure that the CCC has all the required operational and support processes in place. The client shall share all relevant information, training and systems access at the appropriate time so that the CCC can deliver the desired customer experience.

The operational and support processes shall include:

- a) start-up/on-boarding to ensure the CCC can deliver the desired service to customers from the go-live date;

- b) customer-related processes that are communicated with the CCC;
 - 1) Escalation and complaints processes shall be documented, detailing any additional next level support required to assist the handling and resolving of any escalations and complaints that are to be dealt with by the client. It shall include handling complaints about products or services, the client or the CCC. The process should be readily available for customers to access.
 - 2) The client shall take necessary steps to continuously improve customer-related processes where performance deviations and actions related to agreed client-related processes are reported to the client by the CCC.

NOTE Guidance on complaints handling and resolution is available in ISO 10002 and ISO 10003.

- c) agreed termination process for ending a service or agreement with the CCC, to ensure there is no negative impact on customers.

6.7 Forecasting and planning

The client shall share the relevant information in order to enable the CCC to estimate the volume of expected customer contacts, including variances for each contact channel. The client and the CCC shall agree a forecast and planning process.

6.8 Monitoring CCC performance

The client shall agree and document, together with the CCC, the relevant performance measures (metrics) for the CCC, and a process for monitoring the performance of the CCC against client and customer requirements.

6.9 Customer feedback

The client shall put in place processes to gather customer feedback where possible and appropriate, so the client and the CCC can monitor and improve customer experience. Feedback gathering can be done by the client, the CCC or an external organization on behalf of the client.

6.10 Terms of service

The client shall specify terms of the service to be provided between the CCC and the client, indicating designated responsibilities.

NOTE A Service Level Agreement (SLA) can be used for this purpose; see ISO 18295-1:2017, Annex B, for informative guidelines.