



**Pensions
Management
Institute**
Moving pensions forward

Registered Office:
Devonshire House
60 Goswell Road
London
EC1M 7AD
T: +44 (0) 20 7247 1452
W: www.pensions-pmi.org.uk

Demonstrate understanding of the rules that impact on improvements in customer service

What this unit is about

The job of a customer service professional is to develop and improve customer service. However, this must be done within a framework of organisational procedures, regulation and legislation. Some of this framework applies only to your organisation, some applies to your industry sector and some is based on national regulation and legislation. This unit is about rules, regulation and legislation that can impact on the way you develop and improve customer service. It requires you to demonstrate that you follow those rules when taking actions to improve customer service.

When you demonstrate understanding of the rules that impact on improvements in customer service you are able to:

1. Identify organisational policies, procedures and practices that may impact on proposed improvements in customer service
2. Demonstrate an awareness of the procedures and actions needed to secure approval for proposed improvements in customer service
3. Agree with colleagues or service partners the actions needed to meet organisational requirements when implementing proposed customer service improvements
4. Identify relevant customer related legislation and external legislation that may affect the implementation of customer service improvements
5. Identify relevant general business legislation and external regulation that may affect the implementation of customer service improvements
6. Balance the requirements of legislation and external regulation with the needs of the organisation when implementing customer service improvements

Knowledge and Understanding

To be competent at demonstrating understanding of the rules that impact on improvements in customer service you must know and understand

K1. Organisational Policies, procedures and practices that you need to take into account when you propose improvements in customer service

K2. How you gain approval to change customer service procedures or practices

K3. The limits of your own authority and who else in the organisation needs to be involved if you cannot authorise improvements alone

K4. How you would involve colleagues or service partners in the implementation of improvements

- K5. Relevant legislation and external regulation relating to consumer protection
- K6. Relevant legislation and external regulation relating to data protection
- K7. Relevant legislation and external regulation relating to disability discrimination and equal opportunities
- K8. Relevant legislation and external regulation relating to diversity, inclusion and discrimination for reasons other than disability or equal opportunities
- K9. Relevant legislation and external regulation relating to health and safety of customers and colleagues
- K10. The need to balance the requirements of legislation and external regulation with the needs and objectives of your organisation
- K11. Legislation and external regulation that affect customer service in your industry in particular