

BS 8477:2014+A1:2020



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Code of practice for customer service

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Summary of pages

This document comprises a front cover, and inside front cover, pages i to iv, pages 1 to 22, an inside back cover and a back cover.

Foreword

Publishing information

This British Standard is published by BSI Standards Limited, under licence from The British Standards Institution, and came into effect on 31 January 2014. It was prepared by Technical Committee SVS/0, *Customer service – Fundamental principles*. A list of organizations represented on this committee can be obtained on request to its secretary.

Supersession

BS 8477:2014 superseded BS 8477:2007, which has been withdrawn.

BS 8477:2014+A1:2020 supersedes BS 8477:2014, which is withdrawn.

Information about this document

BS 8477:2014 was a full revision of the standard, and introduced the following principal changes:

- a restructuring and thorough update of clauses to bring the standard in line with current customer service good practice;
- additional guidance for smaller organizations and sole traders provided throughout;
- the introduction of [Clause 6](#) focusing on resources, people and technology reflecting the current customer experience and the importance of utilizing web sites and web-based systems such as social media.

Text introduced or altered by Amendment No. 1 is indicated in the text by tags A1 A1. Minor editorial changes are not tagged.

BS 8477:2014+A1:2020 introduces the following principal changes:

- the introduction of [6.3.2](#) focusing on transparency and fair treatment of customers, and introducing measures to reduce the risk of existing customers being disadvantaged by loyalty penalties;
- additional references to transparency and fairness provided throughout.

Use of this document

As a code of practice, this British Standard takes the form of guidance and recommendations.

It should not be quoted as if it were a specification and particular care should be taken to ensure that claims of compliance are not misleading.

Any user claiming compliance with this British Standard is expected to be able to justify any course of action that deviates from its recommendations.

Presentational conventions

The provisions of this standard are presented in roman (i.e. upright) type. Its recommendations are expressed in sentences in which the principal auxiliary verb is “should”.

Commentary, explanation and general informative material is presented in smaller italic type, and does not constitute a normative element.

The word “should” is used to express recommendations of this standard. The word “may” is used in the text to express permissibility, e.g. as an alternative to the primary recommendation of the clause. The word “can” is used to express possibility, e.g. a consequence of an action or an event.

Notes and commentaries are provided throughout the text of this standard. Notes give references and additional information that are important but do not form part of the recommendations. Commentaries give background information.

Where words have alternative spellings, the preferred spelling of the Shorter Oxford English Dictionary is used (e.g. “organization” rather than “organisation”).

Contractual and legal considerations

This publication does not purport to include all the necessary provisions of a contract. Users are responsible for its correct application.

Compliance with a British Standard cannot confer immunity from legal obligations.

Introduction

Meeting or exceeding customer expectations is one of the most important contributing factors in the running of a successful organization in any sector.

This British Standard provides a means by which an organization can judge itself and can be judged by its customers. It provides clearly identifiable and verifiable benchmarks for good practice. It does not, therefore, deal in detail with some of the vital “softer” aspects of customer satisfaction that are less susceptible to this approach.

The ongoing success and development of an organization not only relies on providing reliable good services to the traditional external customer, but also on the need for all organizations to understand the expectation levels and perception of their customers.

Many of the recommendations made in this British Standard are already commonplace in organizations that have a responsive customer service culture. However where this is not the case the application of this British Standard allows organizations to:

- a) set in place mechanisms to ensure levels of customer service that at least meet the needs and reasonable expectations of customers;
- b) be competitive in the marketplace;
- c) differentiate their services from competitors through providing and maintaining innovative customer services;
- d) increase customers’ positive emotional experience with an organization’s services and, through this, building and maintaining customer loyalty;
- e) increase customer retention;
- f) attract new customers through positive word of mouth;
- g) reduce marketing costs;
- h) increase service efficiency;
- i) reduce problem incidence rates, and therefore less time and cost involved in correcting problems experienced by customers and associated complaints that might need to be handled;
- j) maintain and improve services and accountability for public sector service organizations;
- k) create an organization-wide customer-focused approach to developing and maintaining quality services;
- l) improve the ability of customers to deal with an organization;
- m) **A1** adopt transparent practices that help to ensure fair treatment of all customers. **A1**

Customer service culture involves being proactive by anticipating or exceeding customer needs; implementation of this British Standard might for many organizations be the first step in embedding this principle in all aspects of their business and operations.

1 Scope

This British Standard sets out principles for establishing and maintaining an effective customer service culture and mindset in an organization of any size, geographical location or business sector. It also provides recommendations on applying these principles so that the organization has the capability to deliver a consistent standard of service that meets or exceeds the expectations of its customers.

The British Standard is applicable to organizations of all types providing goods or services to customers in person, by phone, post or online. It is intended to help the whole organization (not only staff involved directly in delivering customer service) understand its role in serving customers.

NOTE In this context "organization" includes sole traders, small businesses and consultancies, business-to-business (B2B) or business-to-customer (B2C), public or private companies, national and local government department and agencies, and not-for-profit organizations. Subject to contractual provisions, this British Standard could also be applicable to third party providers and suppliers of those organizations.

This British Standard does not include sales practices, although it does cover customer interactions with sales staff.

2 Terms and definitions

2.1 audit

systematic, independent and documented process for obtaining evidence and evaluating it objectively to determine the extent to which the criteria are fulfilled

2.2 brand

unique product, range or service identity or a specific attribute, production process or service provision

2.3 competency

suitably trained and qualified by knowledge and practical experience, and provided with the necessary instructions, to enable the required task(s) to be carried out correctly

2.4 complaint

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

[SOURCE: BS ISO 10002:2004, 3.2]

2.5 customer

organization or person that receives a product or service

NOTE 1 A customer can be internal or external to the organization, e.g. consumer, client, end user, retailer, beneficiary or purchaser.

NOTE 2 For the purposes of this British Standard, the term "customer" includes potential customers.

2.6 customer centered

establishing business or service around the needs of the customer

2.7 customer relationship management (CRM)

model for managing a company's interactions with current and future customers