



## **IPS CUSTOMER SERVICE STANDARDS**

*The required level of service should be applied to all IPS users including, but not limited to, ILEX members or prospective members, the public, other professionals and organisations, the Board, committee and panel members, ILEX and ITC colleagues*

*Employees should be aware of, and have regard to, the ILEX customer service standards.*

### **Telephone calls**

- Answer the telephone within five rings.
- Greeting should be (good morning/good afternoon), ILEX Professional Standards, your name.
- When making calls, identify yourself and state your reason for calling.
- Answer and make calls in a positive manner, use positive and objective tone and language throughout and promote a positive image of IPS.
- Actively listen to the caller.
- Adapt your tone and language appropriately.
- Identify the name of the caller and use it appropriately but not excessively during the conversation.
- Provide accurate information to answer caller's query(ies). If you are not sure of the correct or appropriate response, do not guess but arrange to call back with correct information and follow up in the time period agreed with caller.
- Explain any technical terms/abbreviations as appropriate to nature of caller.
- Check any information that the caller has provided, particularly numbers/names, where they are not clear.
- Transfer calls by telling the caller who they are being put through to, and introduce the call to the person you are transferring to.
- Where a caller has been transferred more than once or put on hold for a long period, offer to call them back, if appropriate.
- Callers who use inappropriate language or tone should be cautioned before the call continues. Do not hang up unless you have warned them that you will do so.
- Take full messages for colleagues including caller's name, date and time of call, reason for calling, contact information and when the caller is expecting a reply.
- Voicemail message to be clear and up to date. Change message if out of office detailing return date and giving main IPS number or a colleague's number as an alternative.

- Messages to call back should be responded to within one working day of message date or one day of return to office (with the date of return having been left on voicemail).
- Thank the caller as appropriate at close of call.
- Hang up after the caller has done so, not before.
- Follow-up actions agreed with caller to be undertaken within the timeframe agreed.
- Where appropriate, record on Concept or write up attendance note immediately.

## **Emails**

- Font for emails is Tahoma 12 point.
- Use an appropriate greeting, which should generally be for external emails Dear Mr/Mrs/First name. Sign off with Yours sincerely or Kind Regards.
- Emails should be signed off with your name, job title, telephone number, IPS address, IPS website and IPS company details.
- Emails should be acknowledged within two working days and a substantive response should be given within seven working days.
- All emails should have an appropriate heading in the subject box.
- Emails should be presented properly using paragraphs and correct business English, and be professional in tone at all times.
- Remember to attach any attachments!
- Links to ILEX/IPS should be embedded in the message where appropriate.
- Grammar and spell check all emails before sending.
- Where appropriate, standard email responses may be used and must be used where email is used as an alternative to written correspondence where standard wording is required.
- Where an email is best dealt with by a colleague, the message should be forwarded to them promptly, and a note sent to the writer of the email letting them know what action has been taken.
- Complaint emails about the service of IPS to be forwarded to management immediately.
- Internally forwarded emails should be acknowledged within two days of original receipt of email by ILEX Group. Where a colleague has not forwarded the email promptly to IPS, they should be asked to inform sender of delay (if not already done).
- When forwarding emails, check them for sensitive information which may need to be removed before doing so.
- Care should be taken in copying and forwarding emails that they are only sent to appropriate people and not sent unnecessarily.
- Where there is a chain of emails, consideration should be given to deleting earlier emails when replying/forwarding to limit the size of the message (particularly for print purposes).
- Use out of office when you are unable to access your email for any period. This message should provide details of an alternative contact and date of return to office. Out of office should also be used when you are in meetings expected to last for more than three hours.
- All email correspondence relating to members must be logged onto Concept. Disciplinary matters must be recorded in the disciplinary tab. General advice to members should be recorded in the contact history tab.

- Email correspondence to groups of recipients should make use of the bcc field, in order to protect the identity of individual email addresses, where appropriate
- All email correspondence relating to complaints files should be stored in the relevant file on the F drive and printed.
- Read receipts and delivery receipts should not be used as a matter of course, but can be used where appropriate.
- Letters and emails should be treated the same in terms of priority. Emails which are not urgent should not be prioritised over written correspondence.

## **Letters**

- Font for letters is Tahoma 12 point justified.
- Letters must be replied to within seven working days of receipt and if a substantive response cannot be given in that time, an acknowledgement letter should be sent within two days of receipt with a clear indication of when the substantive response will be sent.
- Where appropriate, standard response letters may be used and must be used where standard wording is available.
- Letters must be signed off with name, job title, telephone number and email address.
- Letters received but best answered by a colleague or other department should be forwarded on the day of receipt.
- When management are not in the office, PA to distribute/forward post and copy as appropriate for management to review.
- Internally forwarded letters to be dealt with in accordance with two/seven day policy but from date of receipt within ILEX Group.
- Documents to be laid out properly using paragraphs, correct business English and be professional in tone.
- Links to the IPS website should be given within the body of the letter where appropriate.
- Grammar and spell check all letters for accuracy, with particular emphasis on checking that the name of the person being addressed is correct.
- Letters to be printed onto IPS letter headed paper and headed continuation paper used. Continuation pages should be numbered.
- All letters must be signed by the writer or, in their absence, a colleague.
- Fold letters neatly and ensure the address shows completely through the window but that no other information can be seen.
- All envelopes should be marked with method of postage: First Class, Recorded or Guaranteed Delivery (if not, it will be sent Second Class). Mail should usually go Second Class except for complaints correspondence which should go First Class where a response is required or notice is being given. Reply paid envelopes should be included where appropriate (eg for board and panel members when asking them to return a document).