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IMI is committed to being a high-performing, customer-centric business that inspires leadership performance.

There are many ways we do this. One of the ways is by having clear guidance around our standards and processes so that consistently, staff and associates all working together as a team, can provide a high-quality customer experience. This Customer Experience Standards document is to support all IMI staff and associates in their work: it sets high-level standards for our engagement with our clients. It sits under pillar 3 of our Quality Ecosystem – Effective Stakeholder Engagement.

It is complemented with other tools which provide more detailed information about very specific engagement requirements, such as the Customer Feedback Procedure, the Customer Complaints Procedure. IMI also has a suite of both legal and guidance documents specifically describing the Executive Development programmes or services we provide to specific clients.

This Customer Experience Standards document has at its outset a simple commitment framework. It draws together the principles which are articulated in more detail in the remainder of the document.

Customer Experience Standards

1. We get it right by

- Giving the customer what they need, in the way they need it
- Acting in accordance with relevant (UCC and IMI) policy and guidance and established good practice
- Keeping to commitments, including any published or contracted services and standards
- Making reasonable decisions, based on all relevant considerations
- Avoiding undue delay

How the customer feels: "You manage, meet and exceed my expectations"; "I can trust you"

Our goal: We *consistently* deliver on our customer promise: Service excellence is key to this aim and is defined as the seamless interaction and experience a customer has with us across all touch points and throughout all channels.

2. We are customer focused by

- Ensuring customers can access services easily, including persons with disability or special needs
- Informing customers what they can expect and what is expected of them
- Dealing with people supportively, promptly, and sensitively bearing in mind their individual circumstances
- Well trained, professional staff who are attentive to customers' needs

How the customer feels "It was easy for me to do what I need to do; I feel like to you know and understand me"

3. We are open and accountable by

- Being open and clear about policies and procedures and ensuring that information and any advice provided is clear, accurate and complete
- Stating the criteria for decision making and giving reasons for decisions
- Handling information properly and appropriately
- Keeping proper and appropriate records
- Taking responsibility for our actions

How the customer feels: "I trust you; I feel comfortable asking questions and finding information"

4. We act fairly and proportionately by

- Treating people impartially, with respect and courtesy
- Avoiding unfair discrimination or prejudice and ensuring no conflict of interests
- Dealing with people and issues objectively and consistently
- Ensuring that decisions and actions are proportionate, appropriate, and fair
- Ensuring that rules are applied equitably

How the customer feels: "I trust you"

5. We deal with errors effectively by

- Acknowledging mistakes and apologising where appropriate
- Putting mistakes right quickly and effectively
- Providing clear and timely information on how and when to appeal or complain
- Operating an effective complaints procedure, which includes offering a fair and appropriate remedy when a complaint is upheld

How the customer feels: "You listened to me and fixed my issue quickly and effectively and it enhanced my experience"

6. We seek continuous improvement by

- Actively seek new information and keep abreast of relevant changes across industry; We improve our services in response to market trends, customer needs and thought leadership
- Continuously learning and sharing knowledge and new insights throughout the organisation on a systematic basis
- Exploring the impact of any changes to ensure no negative impact on other staff/processes/customers
- Reviewing policies and procedures regularly to ensure effectiveness
- Actively seek feedback and learn from complaints and customer suggestions, using this knowledge to improve services and performance
- Identifying and correcting systemic problems

How the customer feels: "you listen and understand my needs; we are partners"

1. Context

IMI is a wholly owned subsidiary of University College Cork and is committed to actions which evidence the high standards both of UCC and those of IMI, an executive education provider for almost 75 years, and in top 100 of the Financial Times world rankings for over a decade.

IMI seeks to ensure in all its activities a high-quality service to our members, clients, and participants. Key services are in the provision of executive development education and training, and the principles of the [UCC Student Charter](#) guide all of our learning experiences and our approach to ensure a positive learner engagement experience.

IMI's Executive Education engagement and service provision is also rooted in the guidance provided by the Office of the Ombudsman on *Getting it Right*¹. It offers key principles for organisational good practices to ensure a positive customer experience. IMI also draws on guidance from research and commercial companies where it is helpful in implementing its CX approach² – See Appendices for details. This is a high-level document under which several procedures are presented. E.g., this text does not provide the Complaints Procedure – it is contained in another document.

2. Audience and Purpose

Members, clients, and participants have a right to expect the product and or service that they receive from IMI to meet the standards described herein, and in the UCC Student Charter, as well as formal commitments in contracts of engagement, programme approval and programme validation documentation. All staff, Associate Faculty or agents acting on behalf of IMI, act in a way that reflects these standards and fulfils formal commitments made. Should any person be dissatisfied they have a right to complain.

These Standards, and associated procedures, are established to offer staff and associates a framework in which to undertake their professional work. It can offer the wide variety of IMI clients and participants an understanding of overarching service standards they can expect.

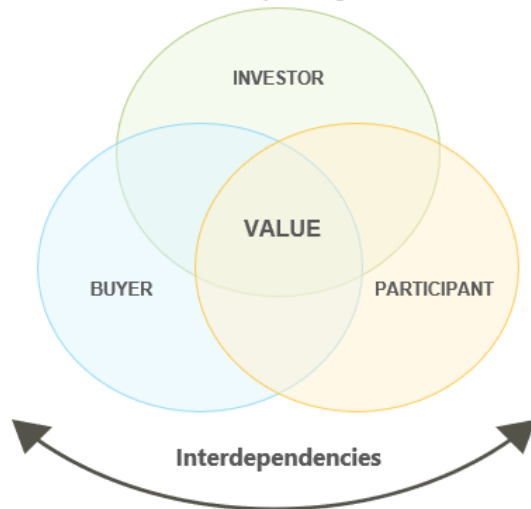
3. Defining Customer Experience

For the purposes of this document, customer experience is defined as “a multidimensional construct focusing on a customer's cognitive, emotional, behavioral, sensorial, and social responses to a firm's offerings during the customer's entire journey”. This means we will look at the complete journey of the customer through their time with IMI with a conscious awareness that human beings experience the world through a variety of lenses each of which influence how the customer may feel or think or act in response to an interaction or a service.

² See Appendix 2

4. Definitions of a customer³

Customer to the IMI can have many meanings. All have different roles & needs.



We have identified 3 customer roles which have interdependencies.

Investor:

- the investor owns the budget, has a need and wants to see a return on their investment, ultimately to the bottom line. They are usually the CEO or line manager.
- In some instances, the investor can be an external body, such as the IDA.

Buyer:

- They understand the Investor's needs and seek the best service provider to meet that need. They are usually the L&D Director or HR Director. They are a key influencer in the buying decision.

Participant:

- They go on the course and reap the benefits, returning to their organisation to deliver value.
- The participant in smaller companies can take on all 3 roles.
- The participant can evolve over their career into the role of Buyer or Investor, or both.

For the purposes of this document, 'customer' refers to external parties who receive our Executive Development services, and neither staff nor associate faculty are the 'customer' referred to here.

5. A Promise

There are two dimensions to an IMI Promise. Firstly, what we promise is - *an Executive Development premium programme or service whose scope is documented in a formal, legally binding instrument.* Secondly *it is the way in which we deliver that programme or service* – some details of which may be covered in a contract, but many of which are in the culture and tone of our customer engagement. We know we are fulfilling our promise to a customer if a) we are fulfilling the terms of our formal agreement with them and b) we are meeting the standards set here.

For the avoidance of doubt, the legal dimension is documented in the:

the **commitment or promise** agreed
and
the **standards established**

- a) in a contract of engagement and its associated statement of works
- b) an Open Education programme profile or approval document – as offered to the potential clients
- c) a graduate programme profile or validation document for programmes leading to UCC awards as offered to potential clients

We fulfil this promise by always providing service excellence and a professional engagement. This involves ensuring a customer has a seamless interaction and experience across all touch points and throughout all channels.

Professional engagement means that the level of service and customer expectations are set in formal ways and that they are always reasonable, appropriate and context sensitive. Boundaries are

³ Definitions here are drawn from IMI-commissioned research

respected by all parties. The Promise is one made in good faith for service excellence, but it is not unlimited or boundaryless – it is fit for purpose. It is as important for IMI as it is for the client.

6. IMI’s approach to Customer Experience Standards

IMI designs and provides effective, impactful executive development experiences. Executive Development with IMI prepares and supports leaders and managers to build a positive future for their organisations.

6.1 Mission

Is what we do. It is the reason we exist and the difference we make in the lives of our customers.

Our Mission, And Passion, Is To Equip Leaders To Build The Future.

6.2 Values

Describes how we will work together to best support the delivery of our mission. Values are the shared beliefs, assumptions, and principles that we believe are fundamental to our desired culture, brand perception and organisational identity. Values are demonstrated through our behaviours; how we treat each other, our customers, and stakeholders in every interaction.

Our values defined:

Our mission, vision, positioning and values form an overarching, integrated and complementary architecture that guides our decision making, as individuals, teams and as an organisation.



Empower Others

We inspire high performance by bringing out the best in ourselves and others. Our energy and commitment ignite organisational success and personal growth.



Perform with Purpose

We passionately believe in transformative learning as a catalyst for sustainable organisational success. We are a team united by a shared mission in the service of our customers.



Lead by Example

We hold ourselves accountable and deliver on our commitments. We lead from the front, practice what we preach, share responsibility and raise the bar through our professionalism.



Transcend Boundries

We seamlessly collaborate as an ecosystem of colleagues, teams, stakeholders, partners and suppliers; locally and globally; of expertise, possibilities and ideas.



Embrace Change

We embody a growth mindset, seeking and sharing insights and innovations to enhance our collective performance. We recognise setbacks as learning opportunities and adapt accordingly.



Act with Courage and Empathy

We build trust through transparent, consistent and straightforward communication. We confidently challenge the status quo, with respect and understanding for others.

6.3 A Sustainable Premium Provider of Executive Development

IMI does not receive public funding, it is a private limited company⁴ which runs as a commercial entity, i.e., it must generate a surplus to reinvest in the business. IMI must ensure that its financial model provides for organisational sustainability into the future and that the organisation is a healthy, long-term, viable, going concern.

In order to maintain our position as a premium and sustainable brand we must ask ourselves what is best for the business in every touchpoint for the customer. Sometimes it may mean not engaging with a particular customer or potential customer.

What is best for the business is matching us with the appropriate customer – a customer who needs and values our services and competencies and is able to pay the actual overall cost of the product.

Sustainability is enhanced by effective customer experience which lead to customer advocacy: satisfied customers buy from us again, try new products and services and recommend us to others. Effective customer experience ensures the seamless delivery of a programme of executive development to customers which in turn drives the creation of effective, seamless internal processes which also reduce friction for staff and Associates. This has the benefit of creating cost savings through eliminating activities that waste time or resources and promotes a better working environment for staff, as well as a high-quality customer experience.

Central to Customer experience excellence is creating sustainable, repeatable, experiences. It is not something that is delivered in a vacuum to one customer, at any financial or human cost. When making any business decisions that relate to customer experience, we must ask ourselves what impact completing this action would have on our staff, profit margin of a programme, or on the integrity of our brand.

7. Our Customer Promise: A high quality experience – for buyers, for investors, and for all customers

7.1 Service excellence

Our aim is that when customers interact **with us**, they should

feel

listened to,
understood,

and **be**

positively challenged,
inspired,

⁴ Legally established as a non-profit provider of education, IMI complies with requirements of the Charities Regulator and is a [registered charity no 20009045](#). This means that profits generated are not returned to shareholders but are reinvested in the organization to further the objectives of the organization, i.e., the provision of high-quality executive education.

encouraged throughout their development journey with us.

Service excellence – providing an excellent product and an excellent service is key to fulfilling this aim. As stated above, service excellence is defined as the seamless interaction and experience a customer has with an organisation across all touch points and throughout all channels. By following the approach to customer experience standards outlined in this procedure we will achieve this aim.

7.2 Staff and Associates put Customers at the Centre of all Work: Creating a customer-centric culture

IMI, staff and associates, act in a way that seeks to demonstrate a commitment to long-term, organisational-wide focus required to develop and maintain a customer experience (CX) to be proud of. It is an acknowledgement that employees in truly customer-centric organisations are dedicated to reflecting on customers' needs, including those latent or unmet needs, and have a passion for improvement and innovation.

Every member of the organisation is proud to know that they share in the responsibility to deliver on customers' expectations. IMI aims to have an environment that supports all employees in continuous professional development and in improving awareness, knowledge, and understanding of our executive education portfolio and how to support our customers in engaging with us. IMI is committed to trusting its staff and associates in developing and maintaining a customer-centric culture. This involves:

- Recognising the appropriate role of customer facing staff to address and resolve issues with authority and responsibility
- Having agreed organisational measures that track success, with the allocation of budget behind good initiatives
- Defining success in a deep and customer-centred manner
- Agreeing timeframes for success
- Ongoing support and commitment from SMT through the systematic monitoring of progress and sharing of successes
- Aligning the approach to CX with the overall goals and strategy of IMI

7.3 Living our Values for our Customers

Before all else, IMI Values guide our culture and behaviour, and they are central to how we provide excellence in Executive Development. Our values are to:

- Empower Others
- Perform with Purpose
- Lead by Example
- Transcend Boundaries
- Embrace Change
- Act with Courage and Empathy

These means that

1. We are reflective, considered, and creative in learning about and responding to buyer, investor, and customer member needs
2. We create a clear customer promise in which we set and agree expectations with defined service outcomes/deliverables – this may be in the contract and statement of works, or in the programme handbook or programme specification, depending on the service/programme.

3. We work together to deliver on that promise and implement inspiring executive education solutions for our customers
4. We use processes and technology to free up employees to focus on value-add opportunities rather than remedial issues.
5. We establish and leverage repeatable systematic processes and procedures that effectively measure and manage IMI's customer experience.
6. We collect and examine data to provide collective insight into customer needs, wants, perceptions, and preferences gained.

7.4 Seeking and Learning from Feedback

IMI seeks feedback from its buyers, investors, and participants in a variety of ways and in both systematic and in ad hoc settings. The overarching goal of obtaining feedback is to contribute to an understanding that we are doing things well for our clients and identify areas for improvement.

A dedicated document on *Seeking and Learning From Feedback* is [here](#).

7.5 Dealing with Errors

7.5.1 Problem-Solving

Simple problems can occur at any stage in the provision of a programme or service. A culture of swift and effective problem-solving is desirable, and it should assist in avoiding recurring complaints and issues and minimising the impact of problems that can be prevented.

Problem Management is the process responsible for managing the lifecycle of all problems. It includes diagnosis of the root cause of problems, the determination of solutions to those problems, and the implementation of solutions.

Problems should always be solved as close to the occurrence of the problem and as quickly as possible, not progressing the problem *unnecessarily* into a hierarchical formal system.

7.5.2 A Complaints Procedure

A dedicated document on dealing with complaints is here

7.6 UCC Student Charter

The Standards articulated in the [UCC Student Charter](#) are essential to the provision of a high quality learning and learner experience, particularly in the context of programmes leading to awards of UCC.

8. Appendices

Appendix one: Getting it Right - Ireland's Office of the Ombudsman

- i. Get it right by:
 - a. Acting in accordance with relevant [UCC and IMI] policy and guidance
 - b. Taking proper account of established good practice
 - c. Providing effective services, using appropriately trained and competent staff
 - d. Making reasonable decisions, based on all relevant considerations
 - e. Avoiding undue delay
- ii. Be customer oriented by:
 - a. Ensuring customers can access services easily, including those with a disability or special needs
 - b. Informing customers what they can expect and what is expected of them
 - c. Keeping to commitments, including any published service standards
 - d. Dealing with people helpfully, promptly, and sensitively, bearing in mind their individual circumstances
 - e. Responding to customers' needs flexibly
- iii. Be open and accountable
 - a. Being open and clear about policies and procedures, and ensuring that information and any advice provided is clear, accurate and complete
 - b. Stating the criteria for decision making and giving reasons for decisions
 - c. Handling information properly and appropriately
 - d. Keeping proper and appropriate records
 - e. Taking responsibility for our actions
- iv. Act fairly and proportionately
 - a. Treating people impartially, with respect and courtesy
 - b. Avoiding unfair discrimination or prejudice, and ensuring no conflict of interests
 - c. Dealing with people and issues objectively and consistently
 - d. Ensuring that decisions and actions are proportionate, appropriate, and fair
 - e. Ensuring that rules are applied equitably
- v. Deal with errors effectively
 - a. Acknowledging mistakes and apologising where appropriate
 - b. Putting mistakes right quickly and effectively
 - c. Providing clear and timely information on how and when to appeal or complain
 - d. Operating an effective complaints procedure, which includes offering a fair and appropriate remedy when a complaint is upheld
- vi. Seek continuous improvement
 - a. Reviewing policies and procedures regularly to ensure they are effective
 - b. Asking for feedback and using it to improve services and performance
 - c. Ensuring that IMI learns lessons from complaints and uses these to improve services and performance
 - d. Identifying systemic problems and correcting them

Appendix two: CX Company Six drivers' framework

A commercial company, the CX Company, suggests a framework of **Six drivers to creating a bond with customers**. Delivering service excellence across all six drivers ensuring that we have a bond with our customers. When customers trust us, they become advocates meaning that they are more likely to do business with us in the future, recommend us to others and try to new products. They are illustrated below:



Figure 2: Source: CXi report 2019^[1]

The following table gives more information on each driver:

We have a real bond	
I trust you	Well trained, professional staff who are attentive to their customers' needs Deliver exceptional experiences with every single interaction creating life-long clients that not only stay with us but recommend us to their friends and colleagues.
You know me	Giving the customer what they need, in the way they need it, brilliantly. If customers feel that you know and understand them, it creates a mutual bond of trust.
You make it easy	Customers should feel comfortable to communicate, enjoy using the products, not be afraid or limited to ask questions and find answers. All this creates a unique CX and keeps customers loyal to the company. Remarkable. Every day. Every customer. Every interaction.
You get me	Moving from the giving-customers-what-they-want mind-set to helping them fully understand what they really need reflects a move from subordinate to peer. Always put yourself in the shoes of the customer and minimize customer effort and maximize customer value.
You deliver on your promise	We have a strong purpose and customer promise that it is all about the customer and making their life better, Going the extra mile for the customer at any time

References

Lemon KN, Verhoef PC. Understanding Customer Experience Throughout the Customer Journey. *Journal of Marketing*. 2016;80(6):69-96. doi:10.1509/jm.15.0420.