



SELF-ASSESSMENT GUIDE

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CSIA Self-Assessment Guide

This Self-Assessment Guide provides an introduction to the International Customer Service Standard (ICSS 2020–2025) and the self-assessment process using the CSIA Self-Assessment Portal.

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1. INTRODUCTION

Your organisation needs to demonstrate readiness to undergo certification assessment under the International Customer Service Standard. The CSIA Self-Assessment Portal is an interactive online tool designed to assist you in providing further information on the Standard, and record your findings before you submit the self-assessment. The self-assessment must address all of the attributes within the Standard.

This CSIA Self-Assessment Portal is designed to help you determine your level of maturity against each attribute associated with ICSS: 2020–2025. This will then enable a ‘gap analysis’ – you will be able to identify on which attributes from the Standard you perceive that you are performing well, and those that you believe require focus or improvement.

About the International Customer Service Standard (ICSS 2020–2025)

CSIA’s International Customer Service Standard (ICSS 2020–2025) has been designed to deliver confidence that your organisation can understand where it is positioned relative to best practice for delivering a leading customer experience to your customers and other stakeholders.

Organisations that take advantage of CSIA’s unique assessment and certification process will be assured that a thorough independent assessment has been carried out to the highest professional level, with reports produced by CSIA Assessors. The confidence gained by having your business strategy and operations reviewed, as well as internal stakeholders interviewed during the assessment process by a qualified Assessor, cannot be overstated.

The purpose of the ICSS is to provide CSIA clients with a recognised best practice approach to assessing the capability of their business’s operations to deliver the best customer experience (Self-Assessment), and then having this assessment validated by an expert CSIA assessment team (Certification Assessment).

2. THE SELF-ASSESSMENT PROCESS

The main steps in the self-assessment process are:

- Form the self-assessment work group.
- Discuss and agree on the process to follow.
- Use the descriptions of each element on the CSIA Self-Assessment Portal as a guide.
- Conduct a gap analysis comparing the attributes from the International Customer Service Standard (ICSS: 2020-2025) and your self-assessment findings.
- Develop a plan to close the gap(s) by implementing identified opportunities for improvement.
- Record your findings and link your evidence.
- Contact CSIA to declare readiness for the certification assessment.

Before the CSIA Self-Assessment Portal is used, you should determine what you are trying to achieve by completing the self-assessment. Once these goals have been discussed with CSIA, and the purpose and direction you want to pursue is established, the organisation will be better positioned to move towards achieving its goal of certification to ICSS: 2020–2025.

The first step of the certification journey is to complete the self-assessment. By using the Portal, you will be able to declare (by submitting it to CSIA) your readiness for the Certification Assessment.

The self-assessment consists of:

- Scoring: Provision for entering the assessment score, derived from the ICSS scoring scale.
- Elements: A list of all the attributes within each perspective of the ICSS.
- Organisation strengths: Existing strengths of the organisation to be identified.
- Opportunities to improve: Opportunities identified to be recorded.
- Evidence: Documentation / links to support your findings.

During the self-assessment process, the assessment score should be used comparatively, and only as a guide or reference. Focus on using the self-assessment process as a tool to understand and to improve your business systems and operations. Through the process of improvement, an organisation might work through the self-assessment a number of times before applying for the Certification Assessment.

You will almost certainly have documents, such as strategies, policies, business plans, procedures and training manuals, that describe how your organisation manages its core business. You should also have evidence to demonstrate that the systems to build and maintain the desired customer experience are operational, e.g., business process records, databases, performance appraisals and standard procedures.

Apply your current project management practices to continue working towards achieving global best practice in customer experience.

Assessment Hints

Where possible, the self-assessment should be conducted using the contributions of a small team. This usually promotes more objectivity and helps to avoid the desire to 'shoot the messenger'.

Seek out objective evidence and examples where possible. Don't simply take somebody's word that an attribute has been addressed!

Seek out answers to questions such as:

- Who is involved in the process?
- Who are the customers?
- What objectives or targets have been set?
- What performance measures are available?
- How can this process be improved?

Use definitions of Intention, Implementation and Integration objectively. Do not up-score; best practice is a moving target.

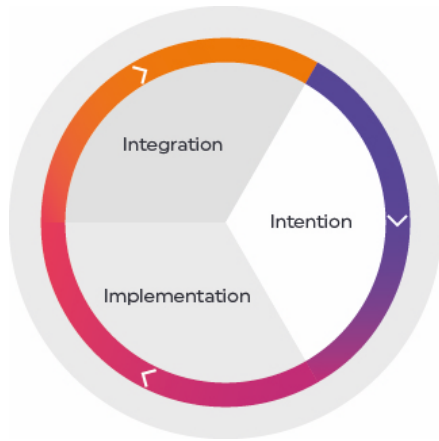
If working in a small team, score each attribute individually, and then look for a consensus score, rather than an average score.

The real focus should be to continuously work on strengths and opportunities. The score is essentially a guide in the self-assessment process.

3. SCORING SCALE

This self-assessment allows you to assess your organisation’s performance against the requirements of CSIA’s International Customer Service Standard (ICSS: 2015–2020).

The scoring range acknowledges that there will be varying rates of progress in:



Intention: Evidence exists to show that the attributes is to be addressed in the current, or in the next, business planning phase.

Implementation: Evidence exists to show that the attribute has been addressed and success measures identified.

Integration: Evidence exists to show that the attribute is part of the culture, and measurement data is being used to enhance service delivery.

In order to achieve certification to ICSS, it is not necessary to achieve a ‘perfect 10’ for each attribute. A score of 10 equates to recognised international best practice. Any score above 8 puts you in contention for recognition at Australian best practice levels.

Under normal circumstances, certification to ICSS will not be granted to organisations where attributes fall only under the ‘Intention’ category. CSIA will be seeking evidence of Implementation and Integration.

SCORING CRITERIA

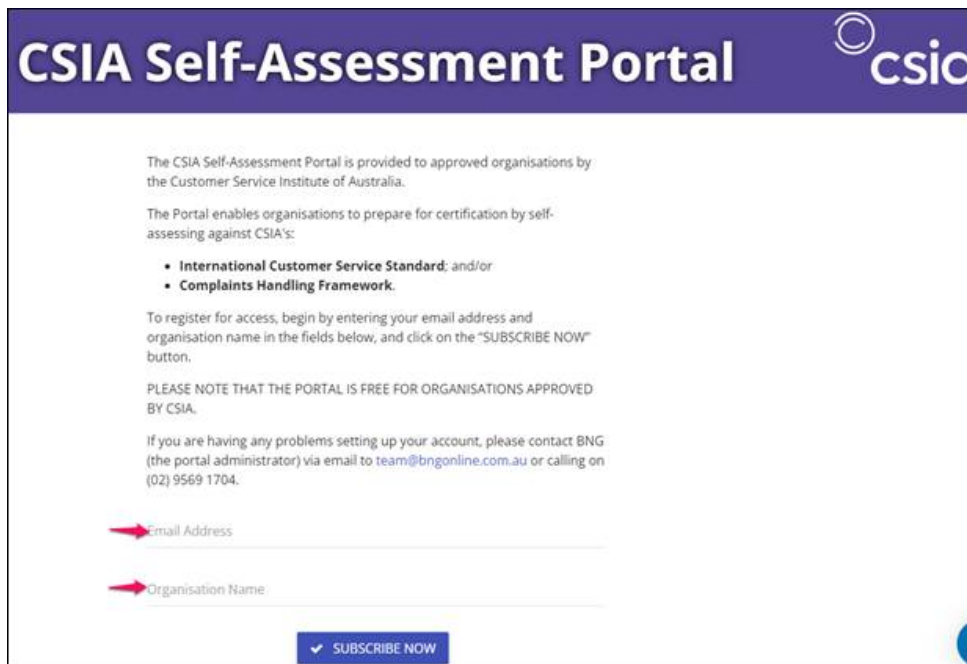
	OBSERVATION	SCORE
Intention	No evidence (or only anecdotal evidence), to show that the attribute is to be addressed.	0
	Evidence exists to show that the attribute is to be addressed in the next business planning phase.	1
	Evidence exists to show that the attribute is being addressed in the current business planning phase.	2
Implementation	Evidence exists to show that the attribute has been implemented in parts of the organisation.	3
	Evidence exists to show that the attribute has been implemented in the majority of the organisation.	4
	Evidence exists to show that the attribute has been implemented in the majority of the organisation and success measures have been identified.	5
Integration	Evidence exists to show that the attribute is integrated over the majority of the organisation.	6
	Evidence exists to show that the attribute is fully integrated across the organisation.	7
	Evidence exists to show that the attribute is fully integrated across the entire organisation and success measures are being monitored.	8
	Evidence exists to show that the organisation is learning from measuring the attribute and is implementing improvement opportunities.	9
	Evidence exists to show that the organisation is considered best practice for the attribute.	10

4. GETTING STARTED ON THE PORTAL

The CSIA Self-Assessment Portal is an interactive online tool designed to assist your organisation in completing your self-assessment in an easy to use and secure way.

How to register your account:

1. CSIA will send a Registration link.
2. Register your organisation to set up an account by providing your Organisation Name and Email Address (see below).



The screenshot shows the registration page for the CSIA Self-Assessment Portal. The header is a dark purple bar with the text "CSIA Self-Assessment Portal" in white and the CSIA logo on the right. The main content area is white and contains the following text:

The CSIA Self-Assessment Portal is provided to approved organisations by the Customer Service Institute of Australia.

The Portal enables organisations to prepare for certification by self-assessing against CSIA's:

- **International Customer Service Standard; and/or**
- **Complaints Handling Framework.**

To register for access, begin by entering your email address and organisation name in the fields below, and click on the "SUBSCRIBE NOW" button.

PLEASE NOTE THAT THE PORTAL IS FREE FOR ORGANISATIONS APPROVED BY CSIA.

If you are having any problems setting up your account, please contact BNG (the portal administrator) via email to team@bngonline.com.au or calling on (02) 9569 1704.

Below the text are two input fields: "Email Address" and "Organisation Name", each with a red arrow pointing to the field. At the bottom right is a blue button with a white checkmark and the text "SUBSCRIBE NOW".

3. You will be notified once your account registration has been approved.
4. Finalise your account by creating your login details and entering additional organisation and contact information.
5. You can commence the self-assessment on the portal. For further information on how to use the Portal, download the User Guide [here](#)

5. FAQs

Below are some Frequently Asked Questions about the CSIA Self-Assessment Portal.

- **What do I do if I have forgotten my login details / password?**

Go to the login page, click on “Forgot Password?” and follow the prompts. You will be sent a password reset link by email, remember to check your ‘Junk’ folder if the email is not in your inbox.

- **What is your policy around ensuring confidentiality and privacy of information?**

Each organisation has its own segregated account in the CSIA Self-Assessment Portal. The only people who can access your account are staff members that you invite into the platform as well as the CSIA team that will review your work.

The web application servers are located off-site in a high-tech Sydney-based secure facility, managed by Amazon Web Services (AWS). Certifications and Independent Attestations for AWS infrastructure and services are available here: <http://aws.amazon.com/security>.

- **How can I access previous assessment submissions?**

You can find archived assessments from previous years in the Standards tab.

- **How do I allow access to my colleagues?**

Click on your organisation name on the top left of the Home Page to access the side bar, select “Add Other Users” to manage Service Account Users in your organisation. From here you can give your colleagues access, or change the content they are able to see.

- **When should the self-assessment be completed?**

The Self-Assessment should be completed minimum of 2 weeks prior to the commencement of your scheduled assessment date.

- **Can the Self-Assessment Workbook be used instead of the portal?**

Yes. Please contact CSIA for the Self-Assessment Workbook.

- **Can I update details / evidence after I have declared completion?**

Yes – you can leave additional comments flagging any changes.

- **Need further assistance?**

If you have any queries about the International Customer Service Standard or the Complaints Handling Framework, please contact CSIA on 1300 912 700 or via the following email address: info@csia.com.au

If you need assistance with the CSIA Portal, please contact the portal administrator BNG on (02) 9569 1704 or email us via team@bngonline.com.au