



# CERTIFIED CUSTOMER SERVICE PERFORMANCE PROFESSIONAL

LIVE ONLINE CERTIFICATION

**2025 EDITIONS:**

> 01 - 05 SEPTEMBER



**Maximize your customers' satisfaction, loyalty and advocacy by enhancing your Customer Service Performance!**

## Key business benefits:

- › Improve Customer Service team's performance;
- › Deliver responsive and engaging services;
- › Gain the recognition, loyalty and advocacy of your external and internal customers.

## Over the last years, the team at The KPI Institute:

- › Documented 21,000+ KPIs from 16 functional areas and 25 industries;
- › Reviewed 1,000+ performance reports from 125 countries;
- › Referenced 30,000+ resources as part of the documentation process.



# Course overview



In a highly competitive market, the quality of the organization's customer service will determine customers' satisfaction, loyalty, increase the chances of them becoming advocates of the company and generate future revenue. This training course focuses on the entities, essentials, enablers and evaluation tools involved in a performant customer service. The course's approach to customer service is unique, as it includes the performance management dimension. Participants will not only understand the important role played by all the entities involved in the process, but they will also become familiar with the implementation phases of a customer service performance management architecture.

## 8 Participants' profile

### > Customer service experts

Individuals working with customers on a regular basis, regardless of their field of expertise or the organization's profile will discover, through this course, the tools and resources required for the effective implementation, sustaining and evaluation of a customer service performance culture within their organization.

### > Top/middle/lower customer service management

Individuals from top/middle/lower customer service management, regardless of their field of expertise, will be glad to discover in Certified Customer Service Performance Professional, a training course especially designed to develop their customer service performance management skills.

### > Professionals interested in customer service

Entrepreneurs, analysts and professionals from different fields, that have to interact with customers in their respective work fields, will acquire the knowledge needed to understand customer behavior and responding standards. The networking opportunity and the possibility of sharing knowledge and personal experiences with other professionals from the customer service area constitutes an important aspect of this training course.

## + Benefits

- > Attain a standardized approach for your services;
- > Acquire a high level of versatility that enables you to react and deal with a vast range of scenarios;
- > Gain competitive advantage by capitalizing on good case practices;
- > Improve your ability to evaluate your external and internal customers' satisfaction;
- > Get professional recognition of your customer service knowledge and skills through a Certification granted by The KPI Institute.

## + Learning objectives

- > Understand how to implement a customer service performance culture, strategy and working system;
- > Develop the channels and tools needed to sustain customer service performance;
- > Learn how to fulfill your internal and external customers' needs and expectations;
- > Practice and improve the competencies required in different customer service settings.

# Agenda



## Day 1 - 4h

### Customer Service Essentials

#### Customer Service Operations (CSO)

- Customer Relationship Management design and elements
- Customer Service goals & Change management
- Customer Services Types
- Customer Service impact on organizational success

#### Customer Relationship Management

- Managing different complaints types
- Complaints sources and characteristics
- Communication skills & techniques
- Customer typology & behavior
- Communication for improved customer experience

## Day 2 - 4h

### CRM performance

#### Performance Management in Customer Service

- Performance Management Architecture
- Desired State of Evolution
- Developing of Strategy Map
- Defining and setting objective

#### KPI definition and target setting

- KPI Definition and Characteristics
- KPI selection: sources and techniques
- KPI target setting
- Key success factors in Managing KPI's

## Day 3 - 4h

### CRM performance

#### Scorecard and dashboards

- Balance Scorecard Model
- Key elements of scorecards
- Developing a scorecard for Customer Service Management
- Scorecard vs Dashboards

#### Measuring Customer Service Performance

- Customer Service Scorecards implementation
- Portfolio of Initiatives
- Data Visualization
- Performance Management Excellence

## Day 4 - 4h

### Performance Enablers

#### Evaluation and continuous improvement

- Performance evaluation process & Reviews
- Compliance management
- Using technology to enhance success in CRM- Data gathering systems
- Customer Satisfaction Improvement Initiatives

#### Customer Service improvement Tools & techniques

- Business acumen ( Product Know How)
- Performance through Service Level Agreements (SLAs)
- SLA success factors (service and management)
- Knowledge and Learning - internal capabilities development - Root cause analysis

## Day 5 - 4h

### Performance Enablers

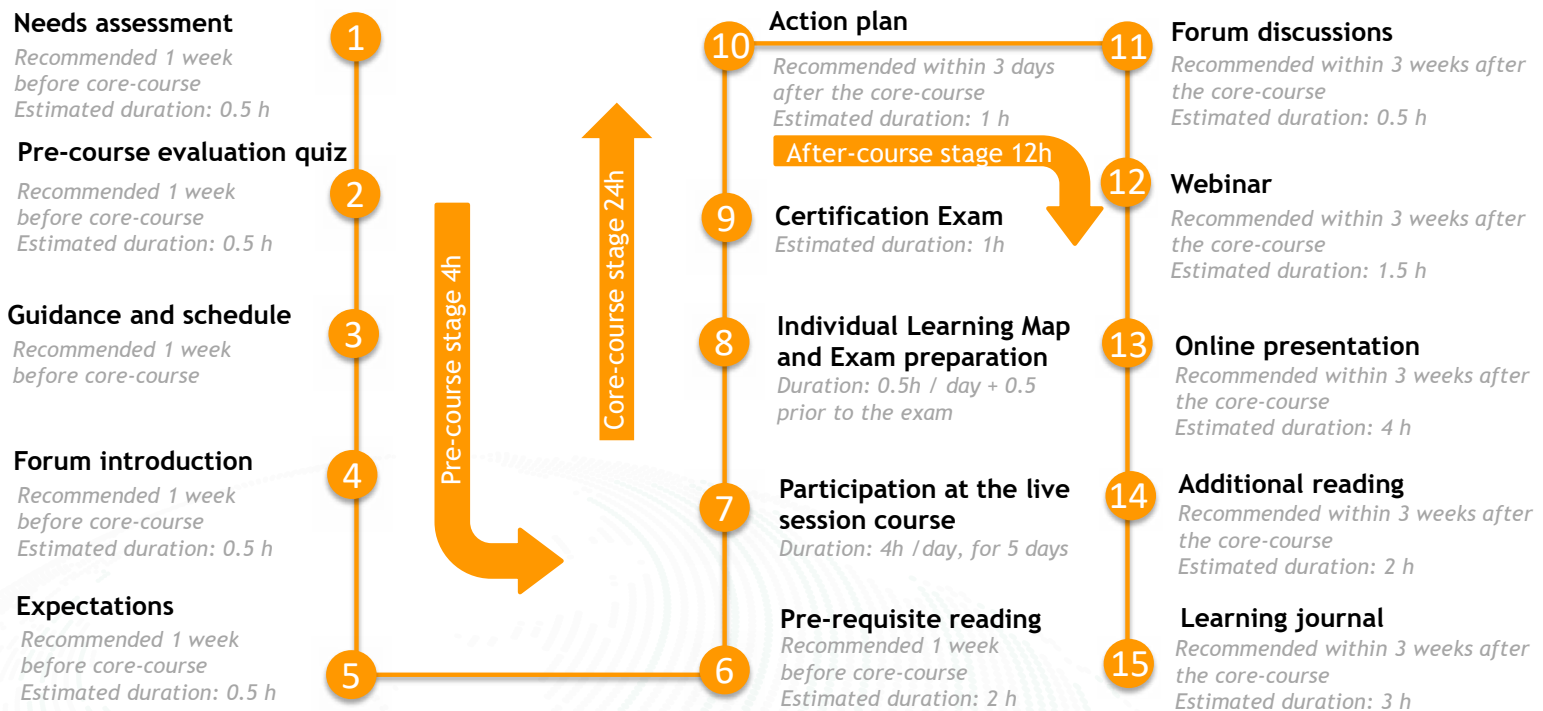
#### Customer Service Team Management

- Customer Service Team Training and preparation
- Improved coaching skills
- Stress Management strategies
- Rewards & Recognition Management

#### Customer Service Performance Maturity Model

- Customer Relationship Management success factors
- Excellent in customer interaction- Excellence Model in CSO
- Course Review and implementation

# Certification Process

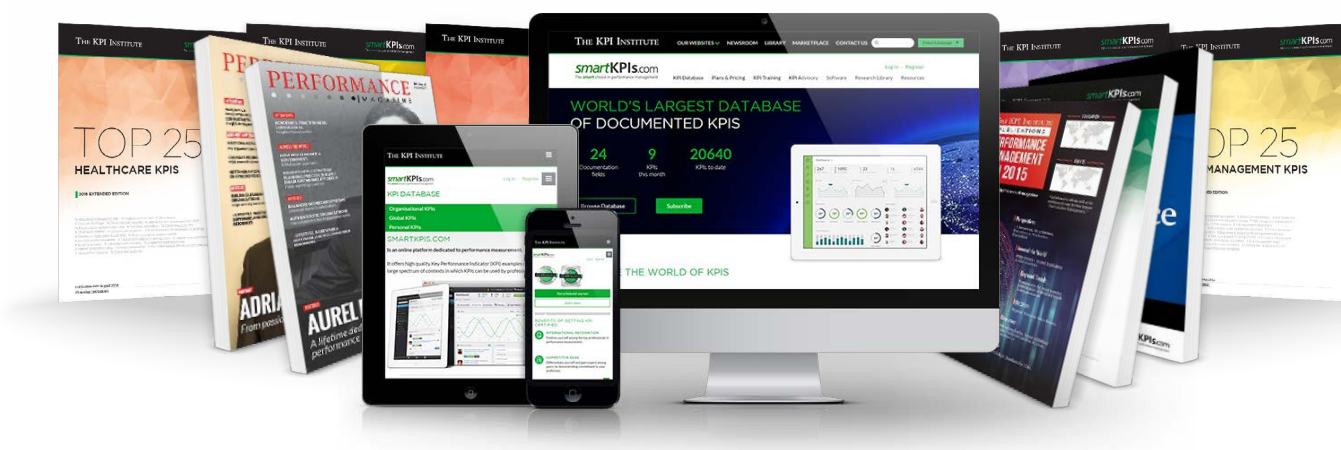


The certification process is finalized only when you complete all of the 3 stages of the learning experience. You will receive:

- Certificate of Completion (soft copy): after completing pre-course activities and passing the Certification Exam;
- Certificate of Attendance (soft copy): after participating at the 5 days of live session course;
- Certified Professional diploma (soft copy): after you have successfully completed all of the 3 stages of the learning experience and the full payment was received by contractor.



# Educational resources



## Course materials

- Course slides;
- Course notes;
- Course quiz;
- The KPI Infographic.

## Webinars

- Free access to all Performance Management webinars series to date.

## Qualitative reports

- Performance Management in 2012 – 2020.

## Videos

- 11 Videos dedicated to Performance Management.

## Performance Management Toolkit

- Templates: Customer service process mapping, Customer Service Performance Maturity Model questionnaire, Customer service standard operation procedure, Dashboard and Scorecard, Portfolio of Initiatives, KPI documentation forms.

## Premium subscription on [smartKPIs.com](https://www.smartKPIs.com)

- Available for 6 months, providing access to 500 fully documented KPIs and over 20,000 KPIs enlisted and one research report from the Top 25 KPIs series.

# Faculty



The KPI Institute retains the authority to designate facilitators for each training course based on business requirements. The TKI Faculty continually expands by incorporating subject matter experts and experienced professionals to guarantee an exceptional experience for our trainees. Consequently, the facilitator assigned to the course may undergo changes prior to the actual delivery date. For information about the appointed facilitator for each session, kindly contact your sales representative or reach out to [office@kpiinstitute.org](mailto:office@kpiinstitute.org).



## Malek Ghazo

"Lead Management Consultant  
Expertise: Performance  
Measurement Management,  
Strategy Management, Data  
Visualization, Customer Service,  
Organizational Excellence,  
Innovation, Sustainability"



## Radu Coccan

"Lead Management Consultant  
Expertise: Strategy Planning and  
Execution"

# Course Fees

Language	Date	Time zone 1	Time zone 2	Standard Fee
English	> 01 - 05 September	18:00-22:00 GST	09:00-13:00 CST (US)	USD \$ 1,500

# Join as a Group

## Customized Live Online Group Training Programs

The KPI Institute offers Customized Live Online Group Training Programs that provide a perfect blend of research, best-practice and best-in-class instructional design.

Leveraging on our extensive research work, our highly skilled faculty, our expertise in providing customized learning solutions, and our next-generation online technology, our Group learning programs are unique, readily-available learning experiences that deliver results for both your employees and your organization.

This fully customized training solution supports organizations of all sizes, to provide their employees with development opportunities in an efficient, impactful, and cost-effective way.

# Benefits of customized live online sessions



## ► Flexibility and convenience

Participants can learn from anywhere and the course can be scheduled in consecutive days throughout one week or selected days over 2 or more weeks. Participants can access learning materials from anywhere, anytime.

## ► Customized course content

Course content, case studies, and exercises will be customized based on the group's industry or selected functional areas, as well as by assessing current needs and competency development requirements.

## ► Business continuity

You can continue your work, with daily sessions, scheduled for a maximum of 4 hours, to ensure both information assimilation and work-related task completion efficiency.

## ► Virtual collaborative learning

Facilitated inter-company learning is enabled, leading to Virtual Teams Cooperation and Communication, with the help of specialized E-Learning technology.

## ► Cost effectiveness

You will save approximately 40% of your investment when compared to traditional face-to-face in-house solutions, due to the logistical burdens being removed from both customer and contractor.

Customized Live Online Group Courses	Online Live Format	Content details
Certification	5 Days - 4h/Day	Fully customized certification course
Masterclass	3 Days - 4h/Day	75% of the certification course content, selected based on group requirements
Essentials	2 Days - 4h/Day	50% of the certification course content, selected based on group requirements
Awareness Session	4 h	1 or 2 selected sessions from the certification content, depending on the length

Group sizes range from a minimum of 10, to a maximum of 25 participants.

Should you be interested in scheduling a live online Group training course, email us at [office@kpiinstitute.org](mailto:office@kpiinstitute.org) or contact one of the region representatives.

## Online Coaching (up to 4h)

- ▶ One of our consultants and facilitators will be dedicated to help customers individually achieve their business objectives, evaluate current system or tools, and provide feedback on how to improve current strategy, performance measurement, and management practices.
- ▶ Our dedicated coaches are industry, capability, and functional area experts, who will guide the participants.
- ▶ They will work closely with the attendees and help them address their individual areas of improvement.
- ▶ We can assist in providing coaching on all the topics that we cover through our certification programs detailed in this brochure.

\*Live coaching will be provided via conference call. The session scheduling will be established either via email/conference call, for all delegates, or individually between each participant and the facilitator.

\*\*Hours to be accessed when required by scheduling as per customer preference and facilitator availability.

Get in touch with us for a customized quotation



# Registration

## 3 ways to register

### Online

marketplace.kpiinstitute.org

### Direct contact

Call us and we will assist you with the registration process

#### Middle-East Delegate

**Teodora Gorski**  
**Managing Director MENA**  
**E: teo.gorski@kpiinstitute.com**  
**M: +971 55 787 6427**

#### Worldwide Delegate

**Alexandru Muntean**  
**Head of Customer Engagement**  
**E: alex.muntean@kpiinstitute.com**  
**M: +40 747 060 997**

### Registration form

Email us with your registration details

## Payment

### Credit card

Pay by credit card using the online facility.

### Bank transfer

1. Send an email containing your contact details and registration request;
2. An email confirmation containing the tax invoice and bank account details will be sent to you;
3. Proceed with the attendance fee payment by bank transfer;
4. Send through email the proof of the payment transaction completion;
5. A tax receipt together with the registration confirmation will be sent to you via email (after the attendance fee payment is confirmed).

Kindly ensure that your payments reflect the Total Amount of the invoice that will be presented to you. It is your responsibility to cover all bank fees due to Telegraphic / Wire transfer.

## Registration form

By filling your contact data, you agree to receive further information about our events. Your privacy is very important to us. We will not sell, rent or share your personal information under any circumstances.

### Participant details:

Mr. ☐ Mrs. ☐

First name

Last name

Job title

Email

Phone

Organization

Department

Date of training course

Training course

City

Country

### Registration cancellation procedure

Any withdrawals have to be announced at least two weeks before the beginning of the course, through fax or e-mail. In this situation, the attendance fee will be refunded, minus \$400 retained for administrative expenditure. The attendance fee will not be refunded if the withdrawal from the course takes place less than 2 weeks before its start date. If you are unable to attend the course after the registration process has been completed, you may delegate another person to attend the course in your place, without paying any further fees. If you have confirmed and paid the attendance fee, but you didn't attend the course, the fee will not be refunded. If you only partially attend the course (one day or a limited number of sessions), you will not benefit from any attendance fee reduction or refund.

### Terms of Agreement

If there are no other standing agreements, this form represents a valid contract between the parties.

I agree to the above terms and conditions.

Signed

Date

Company stamp

The Customer acknowledges and agrees that all materials provided by The KPI Institute, including but not limited to the live presentations, any audio-visual presentations, and the handout materials distributed pre, during and after the training course, shall at all times remain the sole and exclusive property of The KPI Institute. They cannot be made public, and can only be used for the purpose of the individual course participant's benefit. In no event shall the Customer use the live presentations, any audio-visual presentations, and/or the handout materials for any other purpose, including but not limited to the offering of any course, training or seminar that in any manner competes with the course or any portion thereof. This provision shall survive the termination or expiration of this Agreement.



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## HEADQUARTERS

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