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## **Development of service standards — Recommendations for addressing consumer issues**

*Élaboration des normes de service — Recommandations pour  
répondre aux attentes des consommateurs*





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## Foreword

ISO (the International Organization for Standardization) and IEC (the International Electrotechnical Commission) form the specialized system for worldwide standardization. National bodies that are members of ISO or IEC participate in the development of International Standards through technical committees established by the respective organization to deal with particular fields of technical activity. ISO and IEC technical committees collaborate in fields of mutual interest. Other international organizations, governmental and non-governmental, in liaison with ISO and IEC, also take part in the work.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of document should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 ([www.iso.org/directives](http://www.iso.org/directives)).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO and IEC shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received ([www.iso.org/patents](http://www.iso.org/patents)) or the IEC list of patent declarations received (<http://patents.iec.ch>).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT) see [www.iso.org/iso/foreword.html](http://www.iso.org/iso/foreword.html).

This document was prepared by the ISO Committee on Consumer Policy (COPOLCO).

This second edition cancels and replaces the first edition (ISO/IEC Guide 76:2008), which has been technically revised.

The main changes compared to the previous edition are as follows:

- addition of consumer principles based on Consumers International's eight fundamental consumer rights;
- addition of basic elements of customer service and service provisions;
- integration of customer service and service provision elements with consumer principles within a table;
- updating of bibliographical references;
- addition of a “what, who/to whom, where, when, and how” approach to developing a service standard;
- simplification of the text to facilitate its use.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at [www.iso.org/members.html](http://www.iso.org/members.html).

## Introduction

**0.1** Consumers are a key stakeholder group in the standards development process. This document gives writers of service standards the opportunity to understand the consumer perspective, even when a consumer representative cannot participate directly in the development process. It is intended for use by all those involved in the preparation and revision of all service standards.

**0.2** Standards are increasingly being developed to cover services. This reflects the increasing importance of services to the economies of both developed and developing countries. Consumers are the end users of many services. Delivering services that address key consumer issues is essential to a successful business.

**0.3** Taking the needs of consumers into account is likely to lead to a reduction in customer complaints and the business costs incurred because of poor service.

**0.4** Consumers are individuals with different needs and characteristics. This document enables standards writers to prepare service standards that take the needs of all consumers into account, regardless of their circumstances or ability, including those who have different needs (e.g. children, older people, those with a disability, those from different ethnic and cultural heritages or those who can be in a vulnerable situation due to illness, bereavement or other personal circumstances).

NOTE The future ISO 22458 will cover inclusive service.

**0.5** Consumers are individuals with different needs and characteristics, but collectively they are all world citizens. Standards developed in accordance with this document can help businesses to address public concerns at a global level, including ethical and environmental issues.



# Development of service standards — Recommendations for addressing consumer issues

## 1 Scope

This document provides guidance on how to meet the needs of consumers in the development of service standards. This document can be used by anyone involved in the development of service standards and can be applied to any service.

This document is relevant to the full range of services, whether or not a formal contract is entered into or purchase price paid. It also has relevance for public or charitable services, e.g. education, health and care provision, where a financial transaction has not necessarily taken place.

This document relates to the provision of services and therefore does not include specific reference to management systems or professional competence requirements.

## 2 Normative references

There are no normative references in this document.

## 3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

ISO and IEC maintain terminological databases for use in standardization at the following addresses:

- ISO Online browsing platform: available at <https://www.iso.org/obp>
- IEC Electropedia: available at <http://www.electropedia.org/>

### 3.1

#### access

usability of a product, *service* (3.11), environment or facility by people with the widest range of capabilities

### 3.2

#### accessible format

different presentation of information, which can make *services* (3.11) accessible to those with disabilities

### 3.3

#### complaint

<customer satisfaction> expression of dissatisfaction made to an organization, related to its product or *service* (3.11), or the complaints-handling process itself, where a response or resolution is explicitly or implicitly expected

[SOURCE: ISO 9000:2015, 3.9.3]

### 3.4

#### contract

agreement by which one or more parties are obligated towards one or several other parties to provide a *service* (3.11)

Note 1 to entry: A contract can be binding, whether verbal or written.

## 3.5

### **consumer**

individual member of the general public who is the end user of *services* (3.11) or service-related goods (e.g. a smart speaker)

Note 1 to entry: For the purposes of this document, use of the term “consumer” includes a range of potential and existing service users, e.g.

- those thinking about using or purchasing a service;
- those who have purchased a one-off service;
- those in a short- or long-term service *contract* (3.4);
- end-users of a service paying directly for the service;
- end users of a service not paying for the service.

Note 2 to entry: The end user might not be the *customer* (3.6) who purchased the service, e.g. persons having a meal at a restaurant that is paid for either by one person in this group or by a different person.

## 3.6

### **customer**

organization or individual member of the general public purchasing or using *services* (3.11) for commercial, private or public purposes

Note 1 to entry: The customer has a direct interaction with the *service provider* (3.12). The customer can be the purchaser of the service, or in a *contract* (3.4) with the service provider. The customer is not necessarily the end user of a service.

[SOURCE: ISO 26000:2010, 2.3, modified — The words “purchasing property, products or services” have been replaced with “purchasing or using” and Note 1 to entry has been added.]

## 3.7

### **customer satisfaction**

*customer's* (3.6) perception of the degree to which the *service provider* (3.12) has fulfilled the customer's requirements and expectations

Note 1 to entry: *Complaints* (3.3) are a common indicator of low customer satisfaction, but their absence does not necessarily imply high customer satisfaction.

Note 2 to entry: Even when customer requirements have been agreed with the customer and fulfilled, this does not necessarily ensure high customer satisfaction.

[SOURCE: ISO 9000:2015, 3.9.2, modified — The words “the customer's expectations have been fulfilled” have been replaced by “the service provider has fulfilled the customer's requirements and expectations” and the original Note 1 to entry has been removed.]

## 3.8

### **customer service**

interaction of an organization with the *customer* (3.6) throughout the phases of service provision and after sales *service* (3.11)

[SOURCE: ISO 10002:2018, 3.5, modified — The article “the” has been replaced with “an” before “organization” and the words “throughout the life cycle of a product or a service” have been replaced with “throughout the phases of service provision and after sales service”.]

## 3.9

### **consumer representative**

individual or organization with the training and experience to advocate and represent the views of *consumers* (3.5), in order to protect consumer interests



**3.10****feedback**

opinions, comments and expressions of interest in the *service* (3.11) or the complaints-handling process

[SOURCE: ISO 9000:2015, 3.9.1, modified — The phrase "product," before "service" has been removed.]

**3.11****service**

activity, or set of activities, provided for the benefit, or to meet the needs, of a *consumer* (3.5)

Note 1 to entry: Services are generally intangible and often mutable.

Note 2 to entry: A service can be:

- stand-alone, or bundled with a product;
- provided by an organization or an individual;
- a short term, one-off or repeated interaction (e.g. a hotel or restaurant), or part of an ongoing, long term relationship [e.g. a mobile phone *contract* (3.4), mortgage or insurance policy];
- provided free of charge or against payment (in advance, in arrears, in instalments), either directly [e.g. to the *service provider* (3.12)] or indirectly (e.g. in the case of education, health or care services provided by a local authority).

Note 3 to entry: Due to the variety and complexity of some services, a different definition of a “service” can apply in some standards depending on the particular circumstances of the service being provided.

Note 4 to entry: The individual or organization acting as the service provider might offer more than a single service.

**3.12****service provider**

entity that offers one or more *services* (3.11)

Note 1 to entry: The entity can be an individual or an organization.

**3.13****safeguard**

take precautions to prevent or reduce the impact of a failure in some aspect of service provision

**3.14****consumer vulnerability**

state in which an individual can be placed at a disadvantage, or at risk of detriment, during his/her interaction with a *service provider* (3.12) due to the presence of personal, situational and market environment factors

Note 1 to entry: Anyone can be vulnerable at any time. Vulnerability can be temporary or permanent.

Note 2 to entry: Factors that contribute to consumer vulnerability can be personal (e.g. health, illness, injuries, disability, impairment) or situational (e.g. job loss, bereavement, low level of literacy).

Note 3 to entry: An organization’s processes and procedures can reduce or exacerbate consumer vulnerability.

Note 4 to entry: A *consumer* (3.5) when vulnerable can:

- be at higher risk of experiencing negative outcomes when interacting with service providers;
- have limited ability to maximise his/her wellbeing;
- have difficulty in obtaining or assimilating information;
- be less able to buy, choose or access suitable *services* (3.11);
- be more susceptible to certain marketing practices.

**3.15  
personnel  
staff**

persons responsible for delivering a *service* (3.11) on behalf of the *service provider* (3.12)

Note 1 to entry: Personnel can include volunteers, subcontractors and agents, as well as paid employees.

**4 Using this document**

**4.1 Consumer interests in services**

This document provides an overview of how consumer interests should be identified and taken into account in the development of standards for services.

**4.2 Structure**

This document outlines the process standards writers should follow to ensure that consumer interests are considered at all relevant stages of their work:

- [Clause 5](#) outlines a process for standards writers to use to address the key areas of consumer interest, including the needs of older persons and persons with disabilities. It also gives guidance on how to ensure consumer interests are considered in the process of making a standard.
- [Clause 6](#) identifies the key consumer issues to be addressed at all stages where there is an interaction between the service provider and the consumer.
- [Clause 7](#) describes how to apply the consumer principles to key elements of service.

**4.3 Benefits of using this document**

The application of this document can have widespread benefits for service standards writers, entities using those standards and the consumers that use those services, as outlined in [Table 1](#).

**Table 1 — Benefits of using this document**

To standards writers	To industry	To consumers
<input type="checkbox"/> Consumer insight — checklist of key consumer issues to include	<input type="checkbox"/> Give consumers what they want and need	<input type="checkbox"/> Better quality services — higher levels of satisfaction
<input type="checkbox"/> Expert advice — in line with best practice	<input type="checkbox"/> Keep existing customers and win new ones	<input type="checkbox"/> Safer, more accessible services
<input type="checkbox"/> Provides a template for writing standards — saves time and effort!	<input type="checkbox"/> More efficient processes — save money	<input type="checkbox"/> Increased transparency, e.g. costs, terms and conditions
<input type="checkbox"/> Holistic approach, e.g. reminding of relevant standards, legislation and key horizontal issues	<input type="checkbox"/> Avoid common problems and reduce complaints	<input type="checkbox"/> More effective redress systems
<input type="checkbox"/> Ensure consistency	<input type="checkbox"/> Enhanced credibility and brand reputation	<input type="checkbox"/> Increased confidence and trust in service providers
<input type="checkbox"/> Provide mechanism for continuous improvement	<input type="checkbox"/> Maintain and enhance customer satisfaction	<input type="checkbox"/> Increased expectation that the services will meet the service provider's value proposition

**5 Before starting work on a standard**

When drafting a service standard, it is important to ensure that the document deals with all relevant aspects of the service. Before starting work, it can be helpful to think about the following questions:

- a) **What** does the service consist of?

This describes the core elements of the service provision and what is on offer to consumers. A service that offers something a consumer wants or needs is the main reason for consumers to consider using the service.

b) **Who** is the service provider?

The service provider is the individual or organization ultimately responsible for delivering the service to consumers. The service provider is responsible for complying with the agreed service level, regardless of whether other intermediaries have participated in the process.

c) **To whom** is the service provided?

The consumers receiving the service are those whose needs and expectations the service intends to fulfil. It is very important that their profile is clearly identified. The consumers can be individuals or a group, a person or an organization with legal entity. There can be consecutive service episodes with the service provider's objective being to satisfy all of them.

It can be necessary to narrow the range of consumers to whom the service is addressed. If there are consumers (e.g. children) to whom the service is not addressed, this should be indicated in the scope. Once the target group of consumers has been identified, research should be conducted to identify their needs and expectations. It is particularly important that research is done to identify the specific needs of consumers when vulnerable.

d) **Where** is the service provided?

The place, physical or virtual, where the service is provided. Is the natural, built or online environment safe and accessible? Will equipment need to be provided? If so, the safety and accessibility of the equipment will need to be addressed.

e) **When** is the service provided?

The moment or period of time when service provision is carried out. The beginning and termination of a service do not necessarily take place at a specific moment in time and can vary from one service sector to another. Service can be provided in the form of a single event (e.g. parcel delivery) or as a continuous provision (e.g. telephone line); it can be composed of just one single core service (e.g. selling ice cream) or several (e.g. accommodation) and can also include levels or options (e.g. premium or standard service).

f) **How** is the service provided?

The way in which the service is provided, including the methodology, sequence or process. Are personnel involved in the provision of the service? At what points of the service do personnel interact with consumers?

The process outlined in [Table 2](#) is intended to help ensure that key consumer issues are identified and addressed when developing a new service standard or at each revision of an existing one.

NOTE This process is based on one in ISO/IEC Guide 71.

**Table 2 — Consideration of consumer issues at service standard development stage**

<p><b>Stage 1: Define stand- ards project</b></p>	<p>Identify:</p> <ul style="list-style-type: none"> <li>— The purpose, scope and field of application of the standard or other deliverable.</li> <li>— The different types of service provider that deliver the service.</li> <li>— Who is likely to use the service? Who is it intended for? Who else can potentially be impacted by the service?</li> <li>— What are the potential benefits and risks to consumers?</li> <li>— What are the current levels of satisfaction with the service, and are there any common problems that need to be addressed?</li> </ul>
<p><b>Stage 2: Create committee</b></p>	<p>Ensure:</p> <ul style="list-style-type: none"> <li>— Training is provided for committee members who are unfamiliar with the process of standards development.</li> <li>— Committee members are made aware of, and have access to, relevant Guides.</li> <li>— The committee has balanced representation from service providers and others who have an interest in the service provided, including consumer representatives.</li> <li>— Consideration is given to data regarding the consumer experience of the service, e.g. consumer complaints and accident data.</li> <li>— The committee makes use of information from other sources such as service providers, user groups, user surveys/focus groups, market surveillance, validated online reviews.</li> </ul>
<p><b>Stage 3: Develop content of standard</b></p>	<p>Ensure:</p> <ul style="list-style-type: none"> <li>— The standard has addressed the needs of the widest range of potential consumers.</li> <li>— The standard has minimized possible safety, privacy protection and security risks and provided adequate information about those risks that cannot be eliminated.</li> <li>— The standard has maximised the accessibility to the widest range of users, including the use of assistive technology where relevant.</li> <li>— There are appropriate methods for evaluating performance against consumer expectations which will also drive continuous improvement.</li> </ul>
<p><b>Stage 4: Review process</b></p>	<p>Ensure:</p> <ul style="list-style-type: none"> <li>— The draft standard is circulated to consumer representative groups who can potentially be affected by that specific service to seek comments.</li> <li>— The draft is circulated to a wide range of business user stakeholders to seek comments.</li> <li>— Where possible, the trial of the standard with a real-life case study. This can be a good test of how well it works.</li> </ul>
<p><b>Stage 5: Publish standard</b></p>	<p>Ensure:</p> <ul style="list-style-type: none"> <li>— The standard can be reproduced in accessible formats, if required.</li> <li>— There is a plan for the application and promotion of the standard.</li> </ul>
<p><b>Stage 6: Review standard</b></p>	<p>The standard needs to be reviewed regularly to ensure continual improvement. The review should consider:</p> <ul style="list-style-type: none"> <li>— Who is using the standard?</li> <li>— How is it used?</li> <li>— Is it still relevant to consumers?</li> <li>— Are there any new risks for consumers?</li> </ul>

## 6 Key consumer principles to be addressed

### 6.1 General

The key consumer principles, or consumer rights, form the foundation of the consumer interest and should be considered at every point of service planning, design and delivery where there is likely to be contact between consumers and service providers (see [Clause 7](#)). The considerations of these principles throughout the development of service standards will help service providers to ensure they are addressing consumer needs and will drive continuous improvements.

### 6.2 Choice

Promoting consumer choice is a fundamental consumer principle. Consumers should be offered comparable and realistic options, so they are able to choose the service that best meets their requirements. In standardization, this means that a standard should not favour any one particular supplier or be unnecessarily restrictive of the form of service provision. Various characteristics of a service will be balanced with the need to maintain value for money and a competitive market.

### 6.3 Access

Access to services is a function of the ability of consumers to afford the things they need or want, at a time that is convenient for them. Services should be made available to the largest possible number of consumers regardless of location, social and economic considerations and physical or mental impairment. Essential services (such as water, energy and health care) should be accessible to all. The interests of the full range of consumers from children, older persons, people with variations in physical and mental abilities and those with different cultural and ethnic backgrounds and their needs should be included in the development of relevant standards. Standards should ensure that services do not unreasonably discriminate against any particular group of consumers.

Special consideration should be given to identifying and responding to consumers when vulnerable who, due to a wide range of personal factors, can be at risk of disadvantage or detriment when interacting with a service provider and require a more flexible and inclusive approach.

NOTE Further guidance on addressing accessibility in standards is given in ISO/IEC Guide 71.

### 6.4 Information

Without clear, accurate, simple, relevant and timely information, in accessible formats, consumers cannot make informed choices about the services they use. Information and its communication play a crucial role in the selection, provision and effective use of services because, unlike products, there are fewer tangible elements to assist the consumer in gauging quality, fitness for purpose, value for money, etc. Communication of information, especially prior to purchase decision or contract signature, and the manner of doing it (including the attitude of personnel) is a fundamental consideration.

NOTE Further guidance on purchase information for consumers is given in ISO/IEC Guide 14.

### 6.5 Safety

Consumers have the right to expect, and are likely to assume, that all services provided are safe. Safety can include physical safety, health and hygiene, as well as safety, security and privacy of personal data, such as in financial services and e-commerce. Organizations should take all reasonable steps to identify potential risks to consumer safety and minimize them. Where the service has inherent risks, e.g. adventure holidays, it is essential that consumers are provided with information at the pre-purchase stage that clearly explains the potential risks, and responsibilities of the organization and the consumers in minimizing these risks. Safety is particularly important when considering people when vulnerable.

NOTE 1 Further guidance on child safety is given in ISO/IEC Guide 50.

NOTE 2 The future ISO 31700 gives guidance on privacy by design for consumer goods and services.

### 6.6 Redress

If something goes wrong, consumers need to feel confident that there are appropriate provisions in place to handle any concerns or complaints, irrespective of whether the service is provided nationally or cross-border. Organizational procedures should ensure the provision of accessible and effective systems for complaints and feedback, as well as access to impartial dispute resolution services for complaints that cannot be resolved by the internal complaints process. Customer feedback should be used by the service provider to drive continual improvement in its service provision.

NOTE 1 Guidance on complaints handling in organizations is given in ISO 10002.

NOTE 2 Guidance on dispute resolution is given in ISO 10003.

### 6.7 Sustainability

Services should be developed in a way that meets the need for sustainability. Sustainability can be defined as the state of the global system, including the environmental, social, climatic, ethical and economy aspects, in which the needs of the present are met without compromising the ability of future generations to meet their own needs. Sustainability covers a wide range of social, environmental and ethical issues from supporting local communities to protecting global resources. For example, organizations should treat their workers fairly and should minimize the negative impact of their businesses on local communities. Organizations should also consider their impact on the environment by reducing waste and minimizing the use of resources such as water and energy use.

NOTE 1 Further guidance on addressing sustainability in standards is given in ISO Guide 82.

NOTE 2 Further guidance on social responsibility is given in ISO 26000.

NOTE 3 Further information on the [United Nations Sustainable Development Goals](http://www.un.org/sustainabledevelopment/) is given in <http://www.un.org/sustainabledevelopment/>.

### 6.8 Representation

Consumers have the right to be heard. Standards development organizations should ensure that all consumers, including groups in vulnerable situations, are represented in all technical committees or working groups where the subject matter has an effect on consumers. If this is not feasible, they should use other ways to ensure that consumer interests are considered, e.g. by consulting COPOLCO members, while national representatives can consult their local consumer organizations. Service providers should listen to the consumer voice and ensure that the needs of their consumers are central when developing services, and that customer feedback is used to improve services. Increasingly, the mechanisms for obtaining feedback on services are online or by email. Particular care is needed to ensure that such avenues are valid and accessible to the widest possible group of consumers.

### 6.9 Quality

The quality of services is a subjective issue, but consumers' expectations should be met or exceeded. For example, some consumers will be willing to accept a lower quality for reasons of price, providing this does not compromise safety (see 6.5). The service should be fit for purpose and as described. The key issue is that services should meet or exceed consumer expectations. This is one reason why quality is not included as a consumer right.

EXAMPLE A hotel can be 5-star or 1-star. Both are value for money if expectations are met, but the quality of the services provided is very different.

## 6.10 Privacy and data protection

Services should be designed and provided in a way that ensures application of appropriate measures for security and safeguarding the consumers' personal data and for obtaining necessary consent for sharing of personal data with third parties.

**EXAMPLE** The European Union General Data Protection Regulation provides a legislative framework for privacy protection within the European Union.

**NOTE** The future ISO 31700 will cover privacy by design for consumer goods and services.

## 7 How to apply consumer principles across common elements of service

### 7.1 General

The service matrix in [Table 3](#) illustrates how service providers can address consumer issues (see [7.4](#)) by mapping common elements of service (see [7.3](#)) against key consumer questions, prompting service providers to consider a wide range of consumer needs and principles, at all stages of service planning and delivery (see [7.2](#)).

### 7.2 Stages of service provision

This document focuses on services that have a direct impact on consumers, where there is an element of interaction between the service provider and the consumer at some point during the service delivery process. This interaction can occur at:

- a) **pre-service delivery** — the period of time prior to purchase, transaction or decision-making, when consumers are comparing, considering or choosing services;
- b) **service delivery** — the period of time during which the consumer is using or consuming the service;
- c) **post-service delivery** — the period of time after service delivery, after the contract term has ended which can include feedback, complaints or dispute resolution.

### 7.3 Common elements of service

Although it is recognised that all services are different and service providers can interact with consumers in a variety of ways, there are a number of common elements to service provision that can be applied to a wide variety of service industries. These include:

- strategy and principles;
- service planning and design;
- contracts;
- service environment;
- communication with consumers;
- staff and resources;
- privacy and security, data protection;
- billing and payments;
- feedback and complaints;
- continual improvement.

Common elements of service can apply to one or more stages of service delivery (see 7.2) and should be considered by service providers, where relevant, to ensure that the needs of consumers are taken into account.

NOTE ISO 14452 specifies requirements for network services billing.

### 7.4 Consumer questions

Across all the service elements, consumers are likely to have a range of different needs and ask a variety of questions (see Table 3). The list of questions is not exhaustive; further questions can arise in relation to particular service sectors, which can be mapped across to service elements in the same way.

**Table 3 — Service elements, consumer principles and related consumer questions**

<b>SERVICE MATRIX OF THIS DOCUMENT</b>			
<b>Common service provision elements &amp; delivery phases (Pre-, Delivery, Post)</b>	<b>Description of service provision elements</b>	<b>Relevant consumer principles</b>	<b>Consumer questions</b>
<b>Service planning and design Pre-</b>	Understanding the target market, identifying adequate resources (people, money, equipment), emergency planning, safeguarding	Access, choice, representation, safety, sustainability	Am I eligible for the service?  Does the service provider consider my specific needs, <b>preferences</b> and/or limitations?
<b>Strategy and principles Pre-, Delivery, Post-</b>	Organizational strategy, guiding principles, aims and objectives, <b>target user</b>	Access, choice, information, representation, safety, sustainability	What added value/value proposition does this service have for me?
<b>Service environment Pre-, Delivery</b>	Risk assessment, service environment accessibility, service personnel availability, computing systems, equipment used by consumers	Access, safety	<b>Is equipment for service delivery adequate and in good condition?</b>  <b>Am I able to access the service and personnel?</b>
<b>Communication with consumers Pre-, Delivery, Post-</b>	Sales, marketing and advertising, provision of information, consumer contact channels, social networking sites, <b>customer service policies</b>	Access, information	Do I have enough information about the service to make the right decision?  Can I understand it?  Is it honest?  Is it in accessible formats?  <b>Have I been informed of safety risks?</b>
<b>Personnel and resources Pre-, Delivery, Post-</b>	Recruitment of competent personnel, training and support	Information, safety,	Are the personnel knowledgeable, courteous and helpful?
<b>Privacy and security Pre-, Delivery, Post-</b>	Personal data, confidentiality, computer systems, <b>safety of service provision</b>	Choice, information, safety	<b>Is use of my personal data restricted to stated and preauthorised use?</b>  Are emergency services available if needed?



Table 3 (continued)

SERVICE MATRIX OF THIS DOCUMENT			
Common service provision elements & delivery phases (Pre-, Delivery, Post)	Description of service provision elements	Relevant consumer principles	Consumer questions
<b>Contracts and billing</b> Pre-, Post-	Terms and conditions, contracts, cancellation, consumer rights, billing information	Access, choice, information	Do I understand the contract or implied contract? Does the contract give me enough information to make an informed decision ( <b>e.g. rights and responsibilities of provider, buyers and any third party, cancellation rights</b> )?  Are there different methods of payment and is this made clear?  Are bills provided in accessible formats and able to be understood easily?
<b>Feedback and complaints</b> Post-	Complaint systems, personnel feedback systems, dispute resolution	Access, information, redress	Is it easy to feedback views, including complaints and are there a variety of ways to do so? Do the personnel dealing with complaints deal with them promptly, courteously and knowledgeably?  Is there an independent third party to deal with complaints if the service provider is unable to resolve it satisfactorily?
<b>Continual improvement</b> Pre-, Delivery, Post-	Performance monitoring, internal audit, communication between front line staff and management, responsive to feedback, implementing change		Does the service provider use complaints to drive continual improvement in the service offered?

Standards writers should consider the consumer principles (see [Clause 6](#)), consumer questions and the issues that they raise, when developing any standard for a consumer service. Service providers that adhere to standards that address these consumer issues are likely to:

- increase satisfaction by better meeting the needs of consumers;
- improve service delivery and reduce complaints;
- increase consumer confidence in their business.

This document recognises that every industry is different and can have specific needs that need to be taken in to account. [Annex A](#) and [Annex B](#) use two case-study examples to illustrate how two different service industries can address consumer issues. Although the industries are very different in nature, the main service elements can be applied to both and the consumer considerations are similar.

NOTE Guidelines and examples of a certification scheme for services are given in ISO/IEC TR 17028.

## Annex A (informative)

### Consumer issues checklist — Example of an immediate/one-off service

[Table A.1](#) provides guidance on how a service provider in the hospitality industry can take consumer issues (see [7.4](#)) into consideration across all the common elements of service (see [7.3](#)). This case study is an illustrative example only and the list of questions to consider is not exhaustive.

**Table A.1 — Consumer issues checklist — Example of an immediate/one-off service**

Common elements of service	Questions for the service provider to consider
<b>Strategy and principles</b>	Identification of principles and objectives, which take consumer issues into account. Communication of these to all relevant staff and embedded in organizational strategies and policies.
<b>Service planning and design</b>	<p><b>General:</b></p> <ul style="list-style-type: none"> <li>— Who is likely to visit the hotel and use its services? What can they want and need from your hotel?</li> </ul> <p><b>Access:</b></p> <ul style="list-style-type: none"> <li>— Are hotel facilities accessible to all potential visitors and guests with a wide range of needs and abilities?</li> <li>— Are there specific rooms that are accessible to guests with limited mobility?</li> <li>— Are hotel personnel aware of relevant equality/accessibility legislation and has it been implemented?</li> </ul> <p><b>Safety:</b></p> <ul style="list-style-type: none"> <li>— Are there adequate emergency plans in place for fire and evacuation?</li> <li>— Have these been communicated effectively to all relevant members of staff?</li> </ul> <p><b>Sustainability:</b></p> <ul style="list-style-type: none"> <li>— Is there a recycling plan in place?</li> <li>— Is there an environmental policy in place?</li> <li>— Has due attention been given to minimizing the use of energy and water?</li> <li>— Are hotel personnel engaged with initiatives to reduce resources consumption?</li> </ul>
<b>Contracts</b>	<p><b>Information:</b></p> <ul style="list-style-type: none"> <li>— Are all guests made aware of the terms and conditions of service before making payment?</li> <li>— Are the terms and conditions accessible to all guests who wish to refer to them?</li> <li>— Do the terms and conditions clearly communicate the terms of reservation and cancellation?</li> </ul>

Table A.1 (continued)

Common elements of service	Questions for the service provider to consider
<p><b>Service environment</b></p>	<p><b>General:</b> Think about all areas that visitors or guests can use in your hotel, e.g. public areas, reception, restaurant, bar, grounds, guest rooms, swimming pools, gyms. In addition, think about any equipment used in those areas, e.g. playgrounds, electrical appliances, gym equipment.</p> <p><b>Access:</b></p> <ul style="list-style-type: none"> <li>— Is there adequate access for people with disabilities in all public areas with dedicated rooms that are fully accessible?</li> </ul> <p><b>Sustainability:</b></p> <ul style="list-style-type: none"> <li>— Is it easy for hotel personnel, visitors and guests to dispose of rubbish, and use recycling facilities?</li> </ul> <p><b>Safety:</b></p> <ul style="list-style-type: none"> <li>— Is the hotel environment safe?</li> <li>— Do all hotel areas the above meet health and safety requirements including cleanliness?</li> <li>— Do electrical installations meet legal requirements?</li> <li>— Are there written procedures in place for emergency evacuation and what to do in the event of a fire?</li> <li>— Are smoke alarms and other safety systems in place and regularly inspected and maintained?</li> <li>— Are procedures for kitchens and food preparation areas adequate to meet hygiene requirements?</li> </ul>
<p><b>Communication with consumers</b></p>	<p><b>Access:</b></p> <ul style="list-style-type: none"> <li>— Is all hotel information available in accessible formats?</li> <li>— Are communication facilities available to people with disabilities?</li> </ul> <p><b>Choice:</b></p> <ul style="list-style-type: none"> <li>— Is information available in a range of accessible formats, including alternatives to online information?</li> </ul> <p><b>Information:</b></p> <ul style="list-style-type: none"> <li>— What information does the hotel give to guests about its services and facilities—online, in printed literature and advertisements?</li> <li>— Is it fair and accurate?</li> </ul> <p><b>Safety:</b></p> <ul style="list-style-type: none"> <li>— Are emergency and evacuation procedures clearly communicated to all guests?</li> </ul>

Table A.1 (continued)

Common elements of service	Questions for the service provider to consider
<p><b>Personnel and resources</b></p>	<p><b>General:</b>                      A wide range of personnel will be needed, including administrative, cleaning and food preparation staff.</p> <ul style="list-style-type: none"> <li>— Are there clear roles and responsibilities for all members of staff?</li> <li>— Are there clear requirements for their qualifications, competencies, experience and skills?</li> </ul> <p><b>Safety:</b></p> <ul style="list-style-type: none"> <li>— Have personnel been adequately briefed and trained in how to minimize the risk of accidents and what to do in the event of an incident or emergency?</li> </ul> <p><b>Sustainability:</b></p> <ul style="list-style-type: none"> <li>— Where possible can products used by the hotel, such as food, toiletries, linens and cleaning products, be sourced locally?</li> <li>— Do third party suppliers also work sustainably?</li> <li>— Are personnel recruited and trained in how to minimize impact on the environment?</li> </ul>
<p><b>Privacy and security</b></p>	<p><b>General:</b></p> <ul style="list-style-type: none"> <li>— What information does the hotel ask guests to supply and is it all necessary?</li> <li>— Are staff aware of legislation relevant to protection of personal data and hotel procedures in this respect?</li> </ul> <p><b>Safety:</b></p> <ul style="list-style-type: none"> <li>— Does the hotel meet all regulations on data protection?</li> <li>— How does the hotel store and manage personal data of guests?</li> <li>— Are all computer systems secure and regularly maintained?</li> <li>— Is access to this data restricted to specific personnel (e.g. passwords, user logins)?</li> <li>— Are there adequate systems in place to protect personal data and guests' payment details (e.g. encryption, passwords)?</li> </ul> <p><b>Information:</b></p> <ul style="list-style-type: none"> <li>— Are guests told how their information can be stored, used?</li> </ul> <p><b>Choice:</b></p> <ul style="list-style-type: none"> <li>— Are guests given a choice about the level of data they provide and how it can be used?</li> <li>— Are guests given clear information about the level of openness of Wi-Fi?</li> <li>— Are they given the choice to opt out of any further communications or sharing of their data?</li> </ul>
<p><b>Billing and payment</b></p>	<p><b>Information:</b></p> <ul style="list-style-type: none"> <li>— Are bills clearly presented with a price breakdown of any additional costs and services?</li> </ul> <p><b>Access:</b></p> <ul style="list-style-type: none"> <li>— Are bills available in accessible formats on request?</li> </ul> <p><b>Choice:</b></p> <ul style="list-style-type: none"> <li>— Are guests offered a range of different payment methods (e.g. debit/credit card, cash)?</li> </ul>

Table A.1 (continued)

Common elements of service	Questions for the service provider to consider
<b>Feedback and complaints</b>	<p><b>Redress:</b></p> <ul style="list-style-type: none"> <li>— Is feedback from personnel and guests on possible improvements positively encouraged?</li> <li>— Are guests encouraged to provide feedback, including complaints?</li> <li>— Does the hotel have a clear internal complaints procedure?</li> <li>— Are there clear ways of providing feedback, such as a form to complete in the room, or automatic request for feedback via email to evaluate customer satisfaction?</li> </ul> <p><b>Access:</b></p> <ul style="list-style-type: none"> <li>— Are complaints procedures accessible to the widest possible range of consumers, and is information available in accessible formats?</li> </ul>
<b>Continual improvement</b>	<p><b>General:</b></p> <ul style="list-style-type: none"> <li>— Are there procedures in place to analyse all feedback and complaints?</li> <li>— Are there procedures in place to ensure that feedback is acted upon in a timely manner to make the necessary improvements, especially where there is a potential health or safety issue for guests?</li> <li>— Are there procedures in place for performance monitoring of all personnel?</li> </ul>

## Annex B (informative)

### Consumer issues checklist — Example of an ongoing contractual service

[Table B.1](#) provides guidance on how an energy supplier can take consumer issues (see [7.4](#)) into consideration across all the common elements of service (see [7.3](#)). This case study is an illustrative example only, and the list of questions to consider is not exhaustive.

**Table B.1 — Consumer issues checklist — Example of an ongoing contractual service**

Common elements of service	Questions for the service provider to consider
<b>Strategy and principles</b>	Identification of principles and objectives, which take consumer issues into account. Communication of these to all relevant personnel and embedded in organizational strategies and policies.
<b>Service planning and design</b>	<p><b>General:</b></p> <ul style="list-style-type: none"> <li>— Which consumers are likely to use your energy services and do any groups of consumers have specific needs or vulnerabilities?</li> </ul> <p><b>Access:</b></p> <ul style="list-style-type: none"> <li>— Are personnel aware of relevant equality/accessibility legislation and is it implemented?</li> </ul> <p><b>Safety:</b></p> <ul style="list-style-type: none"> <li>— Are there adequate procedures in place to deal with incidents or emergencies, e.g. large-scale interruptions to supply?</li> <li>— Have these been communicated to all relevant members of personnel?</li> </ul> <p><b>Sustainability:</b></p> <ul style="list-style-type: none"> <li>— Is there a recycling plan in place?</li> <li>— Is there an environmental policy in place?</li> </ul>
<b>Contracts</b>	<p><b>Access:</b></p> <ul style="list-style-type: none"> <li>— Are terms and conditions written in clear and simple language that is easy to understand?</li> </ul> <p><b>Information:</b></p> <ul style="list-style-type: none"> <li>— Are all customers made aware of the terms and conditions of service before signing the contract?</li> <li>— Is there a sufficient cooling-off period in place if customers wish to change their mind?</li> <li>— Do the terms and conditions clearly communicate the terms of use and cancellation?</li> </ul> <p><b>Choice:</b></p> <ul style="list-style-type: none"> <li>— Is there a range of different tariffs for customers to choose from and are these clearly communicated and comparable?</li> </ul>

Table B.1 (continued)

Common elements of service	Questions for the service provider to consider
<p><b>Service environment</b></p>	<p><b>General:</b> Think about the different ways that customers can interact with your organization, e.g. in writing, online chat, telephone, face-to-face in offices or public areas.</p> <p><b>Access:</b></p> <ul style="list-style-type: none"> <li>— Where contact is face-to-face, is there adequate access for people with disabilities?</li> <li>— Where contact is by telephone, is the system easily accessible and the route to speak to a real person not overly complicated?</li> <li>— Is your website accessible to the widest possible range of consumers? Think about font size, colours and colour contrast, layout, etc.</li> </ul> <p><b>Choice:</b></p> <ul style="list-style-type: none"> <li>— Do customers have a choice about the method used to contact the organization?</li> </ul> <p><b>Safety:</b></p> <ul style="list-style-type: none"> <li>— If contact with customers is face-to-face, are there written procedures in place for emergency evacuation and what to do in the event of a fire?</li> </ul>
<p><b>Communication with consumers</b></p>	<p><b>Access and inclusivity:</b></p> <ul style="list-style-type: none"> <li>— Is all information available in a range of accessible formats (e.g. Braille)?</li> <li>— Are all customers (especially those whose circumstances make them vulnerable) given adequate notice of planned interruptions to supply?</li> </ul> <p><b>Choice:</b></p> <ul style="list-style-type: none"> <li>— Is information available in a variety of accessible formats, including alternatives to online information?</li> </ul> <p><b>Information:</b></p> <ul style="list-style-type: none"> <li>— Is information about service, terms and conditions and tariffs written in clear and simple language, with attention drawn to key information?</li> <li>— Is it fair and accurate?</li> <li>— Are customers given information about how to use energy?</li> </ul>
<p><b>Personnel and resources</b></p>	<p><b>General:</b></p> <ul style="list-style-type: none"> <li>— Do all personnel that encounter customers have relevant qualifications, competencies, experience, skills and training?</li> <li>— Are there clear lines of responsibility so personnel know who to talk to if they need advice on how to deal with a customer issue?</li> </ul> <p><b>Access/inclusivity:</b></p> <ul style="list-style-type: none"> <li>— Have all personnel been briefed on how to identify consumers whose circumstances make them vulnerable, how to identify their needs and respond appropriately?</li> </ul> <p><b>Sustainability:</b></p> <ul style="list-style-type: none"> <li>— Can office supplies be sourced to minimize impact on the environment (e.g. local suppliers, recycled materials)?</li> <li>— Can energy be sourced from renewable sources, where possible? Can customers opt for a 'green' tariff if they wish to make that choice?</li> </ul>

Table B.1 (continued)

Common elements of service	Questions for the service provider to consider
<p><b>Privacy and security</b></p>	<p><b>General:</b></p> <ul style="list-style-type: none"> <li>— What personal information does the energy supplier collect from its customers (e.g. address, financial data, information about vulnerabilities)?</li> </ul> <p><b>Safety:</b></p> <ul style="list-style-type: none"> <li>— Does the company meet all regulations on data protection?</li> <li>— How is customer information stored and managed?</li> <li>— Are all computer systems secure and regularly maintained?</li> <li>— Is access to this data restricted to specific personnel (e.g. passwords, user logins)?</li> <li>— Are there adequate security systems in place to protect customers' personal information and payment details from external threats (e.g. encryption, firewalls)?</li> </ul> <p><b>Information:</b></p> <ul style="list-style-type: none"> <li>— Are customers told how their information can be stored, used?</li> </ul> <p><b>Choice:</b></p> <ul style="list-style-type: none"> <li>— Are customers given a choice about the level of data they provide and how it can be used?</li> <li>— Are they given the choice to opt out of any further communications or sharing of their data?</li> </ul>
<p><b>Billing and payment</b></p>	<p><b>Information:</b></p> <ul style="list-style-type: none"> <li>— Are bills clearly presented with a clear breakdown of costs?</li> </ul> <p><b>Access:</b></p> <ul style="list-style-type: none"> <li>— Are bills available in accessible formats on request?</li> </ul> <p><b>Choice:</b></p> <ul style="list-style-type: none"> <li>— Are customers offered a choice of receiving bills and statements online or on paper without discriminatory charges?</li> <li>— Are customers offered a range of different payment methods (e.g. direct debit, one off payment, credit/debit card)? And are any penalties, additional costs or savings for this made clear?</li> <li>— Can customers choose to pay monthly, annually? And are any additional costs or savings for this made clear?</li> <li>— Are there sufficient procedures in place to help customers who are in debt to ensure that repayments are affordable without supply being cut off?</li> </ul> <p><b>Redress:</b></p> <ul style="list-style-type: none"> <li>— Is clear information given to customers on bills about how to make enquiries or complaints?</li> </ul>



Table B.1 (continued)

Common elements of service	Questions for the service provider to consider
<b>Feedback and complaints</b>	<p><b>Access:</b></p> <p>Are complaints procedures accessible to the widest possible range of consumers, and is information available in accessible formats?</p> <p><b>Redress:</b></p> <ul style="list-style-type: none"> <li>— Is feedback from personnel and customers on possible improvements positively encouraged?</li> <li>— Are customers encouraged to provide feedback, including complaints?</li> <li>— Does the company have a clear internal complaints procedure?</li> <li>— Is there a form to evaluate customer satisfaction?</li> <li>— Is there clear information on procedure for alternative dispute resolution?</li> </ul>
<b>Continual improvement</b>	<p><b>General:</b></p> <ul style="list-style-type: none"> <li>— Are there procedures in place to analyse all feedback and complaints?</li> <li>— Are there procedures in place to ensure that feedback is acted upon in a timely manner to make the necessary improvements, especially where there is a potential health or safety issue?</li> <li>— Are there procedures in place for performance monitoring of all personnel?</li> </ul>

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1) Under development.

2) Under development.



