

CFACSA13 (SQA Unit Code – H9XW 04)

Deal with customers in writing or electronically



Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

Some customer service delivery involves communicating with your customer in a way that creates a permanent record either in writing or electronically. This form of communication carries risks and implications that are less likely to apply to a conversation held with your customer face to face or on the telephone. This Standard is all about how written or electronic communication can be made effective and can contribute to excellent customer service.

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Performance criteria

Use written or electronic communication effectively

- You must be able to:*
- P1 operate equipment used to communicate in writing or electronically efficiently and effectively
 - P2 ensure that the period of time between exchanges in writing or electronically represents excellent customer service
 - P3 use language that is clear and concise
 - P4 adapt your use of language to meet the individual needs of your customer
 - P5 ensure that the style and tone of your written or electronic communication follows your organisation's guidelines and matches the service offer
 - P6 follow the conventions and accepted practices of the communication channel or electronic platform you are using

Plan and send an effective written or electronic communication

- You must be able to:*
- P7 anticipate your customer's expectations taking account of any previous exchanges you may have had
 - P8 assemble all the information you need to construct the communication
 - P9 plan the objective of your communication
 - P10 format your communication following your organisation's guidelines
 - P11 open the communication positively to establish a rapport with your customer
 - P12 ensure that your customer is aware of the purpose of the communication as early as possible
 - P13 summarise the key point of the communication and any actions that you or your customer will take as a result

Handle incoming written or electronic communications effectively

- You must be able to:*
- P14 read your customer's communication carefully to identify their precise reason for contacting you
 - P15 identify what they are seeking as the outcome of the contact
 - P16 identify all the options you have for responding to your customer and weigh up the benefits and drawbacks of each
 - P17 choose the option that is most likely to lead to customer satisfaction within the service offer
 - P18 summarise the outcome of the communication and any actions that you or your customer will take as a result

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Knowledge and understanding

You need to know and understand:

- K1 the importance of using clear and concise language
- K2 the additional significance and potential risks involved in committing a communication to a permanent record format
- K3 the effects of style and tone on the reader of a written or electronic communication
- K4 the importance of adapting your language to meet the needs of customers who may find the communication hard to understand
- K5 your organisation's guidelines and procedures relating to written and electronic communication
- K6 how to operate equipment used for producing and sending written or electronic communications
- K7 the importance of keeping your customer informed if there is likely to be any delay in responding to a communication
- K8 the risks associated with the confidentiality of written or electronic communications
- K9 the conventions and accepted practices of the channel of communication or electronic platform you are using

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SQA Evidence Requirements to Support this Unit

This Unit is designed to assess the skills and knowledge of candidates in the workplace. Candidate evidence should be generated under workplace conditions (**either paid or voluntary**) and evidence must be generated with different customers on different occasions over a sufficient period of time.

Observation should be the primary and preferred source of evidence of competent performance wherever possible. Observation of candidate performance will be supported by other methods of assessment which may include:

- ◆ witness testimony
- ◆ questioning
- ◆ candidate statement
- ◆ professional discussion
- ◆ product and photographic evidence,
- ◆ relevant active documentation, reports, presentations and
- ◆ other valid evidence which relates directly to learner performance under workplace conditions

A combination of performance and knowledge evidence is required to enable the assessor to confirm that the learner is competent.

Simulation should only be used in exceptional circumstances and it should only be for small parts of the Unit. Simulated assessments **must** be undertaken in a realistic working environment (RWE). A RWE is 'an environment which replicates the key characteristics in which the skill to be assessed is normally employed'. The RWE must provide conditions that are the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Guidelines for using RWE can be found in the Assessment Strategy for Customer Service SVQs at link: <http://www.sqa.org.uk/sqa/16732.html>

SQA's Guide to Assessment is designed to provide support for everyone who assesses for SQA qualifications. It looks at the principles of assessment, and brings together information on assessment in general as well as on best practice in assessment. The Guide to Assessment can be downloaded free from SQA's website www.sqa.org.uk

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Relevant occupations Customer Service Occupations

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