

CFACSA16 (SQA Unit Code – H9XY 04)

Build a customer service knowledge base



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.

Effective and improving customer service may make use of a customer service knowledge base. This knowledge base is built up continuously as the organisation learns from interaction with its customers. A knowledge base may contain a wide variety of information about customers and their transactions with the organisation. It may be drawn from a wide variety of sources. It will, in any case, rely on the actions of you and colleagues in direct contact with customers to build and grow as a useful customer service tool. This Standard is all about actions you take to add to the knowledge base and how you use it to develop the way you deal with customer transactions. This Standard is for you only if your organisation has a systematic and technology supported approach to building a customer knowledge base.

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Performance criteria

Input details of customer queries and requests and develop responses

You must be able to:

- P1 identify through active listening customer queries and comments for inclusion in the knowledge base
- P2 classify information collected through customer contact for inclusion in the knowledge base
- P3 identify questions frequently asked by customers
- P4 identify the broad customer service messages of your organisation's answers to frequently asked questions
- P5 work with colleagues to develop responses to customer queries and requests
- P6 contribute ideas and responses to the customer knowledge base which build on key organisational customer service messages
- P7 check the effects of possible responses included in the knowledge base with customers during live customer service delivery or in trials
- P8 monitor the customer service knowledge base to identify trends and patterns

Use a customer service knowledge base

You must be able to:

- P9 access information from the customer service knowledge base using specific search criteria
- P10 browse the customer service knowledge base to research a topic of interest or project area
- P11 use the customer service knowledge base to inform the introduction of a new product or service variation
- P12 use the customer service knowledge base to respond to a specific customer request or query
- P13 assist a colleague to locate specific information in the customer service knowledge base
- P14 add to the customer service knowledge base as a result of dealing with a customer request or query

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Knowledge and understanding

You need to know and understand:

- K1 the structure and content of your organisation's customer service knowledge base
- K2 input and update routines for adding to the customer service knowledge base
- K3 ways in which information for a customer service knowledge base can be drawn from different sources, including social media platforms
- K4 ways that information in a customer service knowledge base can be classified
- K5 questions frequently asked by customers of your organisation
- K6 the importance of working with colleagues to develop responses to customer requests and queries
- K7 your organisation's key messages in relation to the services or products you are delivering
- K8 ways to interpret information in a customer service knowledge base
- K9 techniques for assisting a colleague to locate information in a customer service knowledge base

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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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Suite

Customer Service (2013)

Key words

improving customer service; knowledge; interaction; colleagues; customer transaction; customer service; communication; problem solving; behaviours; work with others; team working