

CFACSB6 (SQA Unit Code – H9Y1 04)

Use questioning techniques when delivering customer service



Overview

This Standard is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

This Standard is about how you use questioning both in planned sequences and in spontaneous conversation to paint a picture of what your customer wants and how your organisation can deliver it. This Standard is for you if you come into contact with your customer face to face, by voice technology or on-line with immediate interaction. This Standard is probably not for you if you deal with customers remotely when it takes time to exchange questions and responses.

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Performance criteria

Establish rapport and identify customer concerns

You must be able to:

- P1 greet your customer sincerely and invite a full and open response
- P2 use planned or spontaneous lines to indicate to your customer that you empathise with their initial enquiry
- P3 invite more detailed explanation from your customer
- P4 listen closely to your customer's responses to strengthen your understanding of their concerns
- P5 use both open and closed questions to make appropriate connection with your customer and open the door to more detailed investigation
- P6 identify and note your customer's feelings and mood in relation to the information you are seeking

Seek detailed information from customers using questioning techniques

You must be able to:

- P7 follow a planned trail of questions to explore in detail customer concerns you have already identified
- P8 hold a spontaneous conversation with your customer to explore in detail customer concerns you have already identified
- P9 explain to your customer why you need the information you are asking for
- P10 use probing and searching questions that draw on comments or words used by your customer
- P11 thank your customer for the information in a way that encourages further open responses
- P12 follow organisational procedures to record your customer responses to inform future actions

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Knowledge and understanding

You need to know and understand:

- K1 why establishing rapport makes it easier to draw information from customers
- K2 ways to greet customers that immediately build rapport
- K3 reasons for using planned question patterns to draw out particular information
- K4 reasons for using spontaneous conversation to draw out particular information
- K5 the importance of active listening when seeking detailed information from customers
- K6 the differences between and uses of closed and open questions
- K7 the importance of explaining to customers why information is needed
- K8 why particular trigger questions are effective in gaining specific information
- K9 how to question and respond effectively using a chosen channel of communication or social media platform

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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

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Questioning; delivery; conversation; rapport; closed questions; open questions; customer service; communication; problem solving; behaviours; work with others; teamwork