

CFACSB7 (SQA Unit Code – H9Y2 04)

Deal with customers using bespoke software



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.

Customer service is often delivered using bespoke software when dealing with customers face-to-face, by telephone or on-line. For the process to be effective, you must be able to navigate the system quickly by directly following recommended routes and using all the functionality of the system. Customers are unaware of the details of the system you are using and they must be kept informed of the different steps you are taking. Your use of the system must also ensure that you keep appropriate records of the transaction so that it can proceed successfully through the next stages. Most of all, customer satisfaction must drive the interaction and it should not appear to be dominated by the demands of the software. This Standard is for you if you are responsible for delivering service to customers at the same time as operating bespoke service software. Do not choose this Standard if you do not make regular use of a bespoke software system when dealing with customers.

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Performance criteria

Prepare to deliver customer service using bespoke software

You must be able to:

- P1 sign on and open access to appropriate functions in the IT system
- P2 navigate the architecture and geography of the customer service site to ensure you can access all appropriate areas
- P3 explore screen or menu routes that are most appropriate for the customer service you are seeking to deliver
- P4 ensure that you are familiar with the software manual, help screens or help lines to know where to locate technical support when needed
- P5 prepare your work area to deliver customer service using bespoke software

Deliver customer service using bespoke software

You must be able to:

- P6 identify your customer or the services or products they wish to access
- P7 follow organisational procedures to step through the system in a way that responds to your customer's needs
- P8 use search or other specialist functions within the software to respond to customer requests
- P9 enter new records using the bespoke software system
- P10 amend customer service records in the bespoke software system
- P11 communicate with your customers in terms they can understand relating to the software system
- P12 follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software
- P13 interpret error messages and act on them to support your customer service
- P14 refer your customer to a colleague following organisational procedures if you are unable to complete the transaction

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Knowledge and understanding

You need to know and understand:

- K1 access and sign-on routines for the bespoke software system
- K2 the architecture and geography of the bespoke software system
- K3 different screen or menu routes that can be followed to meet customer requirements
- K4 sources of support and help for the bespoke software including manuals, help screens and help lines
- K5 the importance of preparing a work area before delivering customer service
- K6 search or other enquiry facilities within the bespoke software system
- K7 the importance of avoiding jargon and system terminology when communicating with customers
- K8 ways to respond to error messages when using a bespoke software system
- K9 referral points and sources of information when you are unable to meet customer needs using the bespoke software system
- K10 links between the bespoke software system and open networks or social media platforms that may be appropriate for communication with your customers

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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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bespoke software; contact centres; telephone; on-line; functionality; customer service; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information services; products