

# CFACSD4 (SQA Unit Code – H9YK 04)

## Support customers using on-line customer services



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### Overview

This Standard is part of the Customer Service Theme of Development and Improvement. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

Many organisations develop their customer service by directing customers towards on-line services. Customer service delivered on-line leaves a customer isolated and reliant on screen routes and instructions. A customer may seek help face to face or by telephone. That help will involve you in understanding what your customer is trying to achieve, how the system allows for that and what point they have reached in terms of finding the right route. Difficulties can arise if the system fails or if your customer is unable to discover how it can deliver what they want. This Standard is for you if one part of your job involves helping customers to find their way through on-line systems.

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#### Performance criteria

#### Establish the type and level of support your customer needs to achieve on-line customer service

*You must be able to:*

- P1 ensure that you are completely familiar and up-to-date and with the on-line services that your customers use
- P2 listen carefully to what your customer is trying to achieve
- P3 listen carefully to what your customer is having difficulties with
- P4 question your customer to discover their degree of familiarity with the system
- P5 offer your customer the option of trying the on-line approach once more
- P6 agree with your customer the exact nature of their problem and steps that may be taken to overcome it

#### Support on-line customer service in conversation with your customer

*You must be able to:*

- P7 explore the on-line customer system in order to develop your own knowledge and skills in its use
- P8 step through the screen sequence with your customer whilst allowing them to operate the system for themselves
- P9 address your customer in an understanding and supportive manner P10 explain to your customer why certain steps are required in the process P11 offer the options to your customer of taking them through the process or completing the transaction yourself
- P12 promote access to additional services or products when supporting customers on-line

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#### Knowledge and understanding

*You need to know and understand:*

- K1 how your organisation's system for on-line service delivery works
- K2 the importance of close active listening to discover what your customer is trying to achieve
- K3 ways to communicate clearly with customers who have different levels of skills and understanding of the on-line system
- K4 why it is generally preferable for your customer to complete a transaction for themselves
- K5 the importance of building customer confidence in using the on-line system by supporting and encouraging
- K6 the benefits and drawbacks of talking a customer through use of the system or completing the transaction yourself
- K7 additional services or products that may be promoted to on-line 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](http://www.sqa.org.uk)

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**Suite**

Customer Service (2013)

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**Key words**

face to face; telephone; system failure; development;  
improvement; on-line; customer service; contact centres;  
improve; develop; communication; problem solving;  
behaviours; work with others; teamwork; giving information;  
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