

SFJ ZB3 - SQA Unit Code D7F6 04

Provide effective customer service



Overview

This unit is about dealing with 'customers' – people for whom you, your team or your organisation provide a service that can be about, providing information, taking messages or providing other forms of support. Customers can be people inside your organisation – people who are not part of your immediate team – or they can be people outside your organisation. Examples include official and personal visitors, other departments in your organisation or other organisations such as the courts, police, probation service etc. Customers are not individuals in custody. They may need information and advice or be dissatisfied with or have a complaint about a service or product you or your organisation has supplied.

There are three elements

- 1 Communicate with customers
- 2 Provide services to meet customer requirements
- 3 Help customers with problems and complaints

Target Group

This unit applies to all staff who work with customers – individuals or organisations – from inside or outside the organisation.

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Performance criteria

Communicate with customers

- You must be able to:*
- P1 follow the correct organisational procedures for greeting and addressing customers
 - P2 present a positive image of yourself and the people you work with to your customers
 - P3 communicate with customers clearly, politely and confidently
 - P4 identify when there are specific problems communicating with customers and follow organisational guidelines to seek to resolve difficulties
 - P5 refer any problems you cannot deal with yourself to the relevant person

Provide services to meet customer requirements

- You must be able to:*
- P6 obtain relevant information about the customer's needs and what services they require
 - P7 identify and agree if there are other services that would be more appropriate to their needs
 - P8 make sure any information you give the customer is accurate and up-to-date, within the constraints of organisational rules on confidentiality and your level of authority
 - P9 only provide services to the customer that you are allowed to
 - P10 provide the agreed services within the agreed timescales
 - P11 check with the customer to make sure they are satisfied with what you have done
 - P12 record clearly and accurately what services were requested and provided

Help customers with problems and complaints

- You must be able to:*
- P13 record clearly and accurately what services were requested and provided
 - P14 refer matters, where required and/or outside your level of responsibility or expertise, to the appropriate authority
 - P15 show that you understand how the customer feels
 - P16 identify potential suitable solutions to their problems using your organisations procedures
 - P17 suggest and explain these solutions to the customer and agree a way forward
 - P18 cannot reach an agreement, you refer the problem to a relevant colleague and explain to the customer what is happening
 - P19 follow through any agreed solutions with the customer and find out if they are satisfied with the result
 - P20 follow your organisation's procedures for recording and reporting the problem and what you have done

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Knowledge and understanding

For the whole unit

You need to know and understand:

- K1 why effective customer service (both to internal and external customers) is important
- K2 who are the customers to whom your team or organisation provides services
- K3 what your organisation's procedures are for dealing with customers
- K4 the special needs that your customers may have
- K5 why it is important to take account of customer's special needs and how to do so

Why it is important to take account of customers' special needs and how to do so

You need to know and understand:

- K6 what is a 'positive image' of yourself and the people you work with, and how to present this both face-to-face and on the phone
- K7 why a positive image is important
- K8 why you should deal with customers politely and promptly, and your organisation's standards for this
- K9 how to communicate clearly and confidently with customers adopting an appropriate tone of voice
- K10 the importance of body language when communicating with customers face-to-face
- K11 why it is important for both yourself and the customer to understand what is being said
- K12 the types of problems that may occur when you are communicating with customers
- K13 how to identify communication problems and deal with them effectively

Providing services to meet customer requirements

You need to know and understand:

- K14 the types of services that your team or organisation provides to customers, and your role in supporting this
- K15 why it is important to be clear about what the customer requires, and how to do so
- K16 the importance of identifying customers' needs and other services you could provide to meet these
- K17 why it is important to agree and keep a note of the customer's requirements
- K18 the types of services you are able to provide within your job role
- K19 how to make sure information is accurate and up to date
- K20 the importance of providing the service within agreed timescales
- K21 why it is important to check that the customer is satisfied with the service, and what to do if they are not

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Helping customers with problems and complaints

You need to know and understand:

- K22 the basic legal requirements when dealing with customer problems and complaints
- K23 your organisation's procedures for dealing with problems and complaints
- K24 why it is important to collect as much information as possible about the customer and their problem, and confirm this information with them
- K25 the relevant information that should be collected
- K26 the importance of showing empathy with the customer, and how to do so
- K27 why it is important to explain more than one possible solution and reach agreement with the customer
- K28 who the relevant person is to whom you must refer problems when you cannot reach agreement with the customer
- K29 why it is important that the customer knows what is happening
- K30 why it is important to follow through agreed solutions and to check that the customer is satisfied
- K31 how to deal with customers politely and calmly, especially when they are angry or excited
- K32 why it is important to show the customer that you are determined to solve their problem, and how to do so
- K33 your organisation's procedures for recording and reporting problems and complaints

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