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#### 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.

You and your organisation need information about your customers and their behaviour to answer customer questions and to respond to customer requests. Information about customers is also used by your organisation to develop its customer service. Some customer information is collected from your customers. Other customer information is collected through information systems and equipment that make records of service delivery. In either case you must collect information, retrieve it and supply it when needed. Good customer information provides a sound basis for all customer service transactions. The quality of the customer information depends heavily on the skills and attention to detail of the person dealing with the information.

## CFACSA6 (SQA Unit Code – FE25 04)

### Process information about customers

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#### Performance criteria

#### Collect information about customers

- You must be able to:*
- P1 collect and record new information about customers following your organisation's guidelines
  - P2 update existing information about customers
  - P3 record and store information about customers that is accurate, sufficient and relevant following organisational guidelines

#### Select and retrieve information about customers

- You must be able to:*
- P4 respond promptly to authorised requests for information about customers
  - P5 select and retrieve relevant information for customers or colleagues following your organisation's guidelines

#### Supply information about customers

- You must be able to:*
- P6 supply accurate and sufficient information about customers to meet your customers or colleagues' expectations
  - P7 choose the most appropriate way to supply information to your customers or colleagues
  - P8 confirm that your customers or colleagues have received and understood the customer information

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#### Knowledge and understanding

*You need to know and understand:*

- K1 your organisation's procedures and guidelines for collecting, retrieving and supplying information about customers
- K2 types of personal information about customers that should and should not be kept on record
- K3 how to collect and validate information about customers efficiently and effectively
- K4 how to operate the customer information storage system
- K5 why processing information about customers correctly makes an important contribution to effective customer service
- K6 the importance of attention to detail when processing information about customers
- K7 legal and regulatory restrictions on the storage and use of customer data

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**Originating organisation** Skills CFA

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**Original URN** CFACSA6

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**Relevant occupations** Customer Service Occupations

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**Suite** Customer Service (2013)

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**Key words** customer service; communication; problem solving; behaviours; work with others; team working; gather information; answer questions; respond to requests; collect information; retrieve information; supply information