
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.

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Process information about customers

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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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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Developed by	Skills CFA
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Version number	2
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Date approved	January 2013
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Indicative review date	January 2016
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Validity	Current
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Status	Original
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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
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