

CFACSD7 (SQA Unit Code – FE2P 04) Support customers using self-service technology



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 self-service equipment which is operated by the customer alone. Regular customers become familiar with how that equipment operates and some will feel uncomfortable about being offered further help. Others may be learning about the use of the equipment for the first time or may be experiencing particular problems. Sometimes equipment fails and authorised intervention will be needed to clear it. Whichever is the case, you must be able to recognise what help and intervention is needed and to provide that in a way that pleases your customer and builds their confidence in the use of the equipment. This Standard is right for you if any part of your job involves helping and encouraging customers to operate self-service equipment in order to improve their customer experience.

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Performance criteria

Identify the type of help needed by a customer using self-service technology

You must be able to:

- P1 prepare a standard demonstration of using the self-service equipment
- P2 prepare to answer frequently asked questions about the operation of the self-service equipment
- P3 identify signs of when a customer is having difficulty with the self-service equipment
- P4 choose an appropriate style and level of intervention to help a customer who is having trouble using the self-service equipment

Assist a customer using self-service technology

You must be able to:

- P5 maintain a professional, polite and approachable manner while you observe customers using self-service technology
- P6 demonstrate use of the self-service equipment to a customer
- P7 respond to a request for help from a customer using self-service equipment
- P8 make use of staff override options to clear self-service equipment for use by customers
- P9 talk a customer through use of the self-service equipment whilst allowing them to operate it
- P10 invite a customer to repeat the operation of the self-service equipment if that helps them to learn
- P11 make positive and encouraging comments to a customer who is learning to use the self-service equipment
- P12 explain to your customer why certain actions and steps are needed to operate self-service equipment
- P13 troubleshoot problems with self-service equipment and report errors and issues to appropriate people

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Knowledge and understanding

You need to know and understand:

- K1 reasons why your organisation chooses to offer customers self-service equipment
- K2 all aspects of normal operation of the customer self-service equipment
- K3 frequently asked questions about operation of the self-service equipment and effective answers to those questions
- K4 techniques for giving an effective demonstration of self-service equipment
- K5 signals and signs that a customer needs help with self-service equipment
- K6 organisational procedures for using staff intervention to clear self-service equipment
- K7 the importance of building customer confidence in using self-service equipment
- K8 organisational procedures for dealing with self-service equipment problems

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Suite

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Key words

self-service equipment; self-study; technology; interventions; operators; customer experience; customer service; contact centres; improve; develop; communication; problem solving; behaviours; work with others; teamwork; giving information