

CFACSA19 (SQA Unit Code – H9Y0 04)

Deal with customers using a social media platform



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.

Many organisations interact with their customers through a variety of social media platforms. The evolution of Internet-based communication channels has led to customers choosing that medium for a wide range of communication with organisations providing services or products. Customers form expectations through the way the organisation presents itself in web-based communications and by the way it responds to customers and potential customers.

Expectations are also affected by the conventions and functions of a particular platform and by other customers and network contacts who act as influencers. The reputation of your organisation can be directly affected by social media interactions and in particular the way you deal with negative reactions and problems which find their way into a public arena. This Standard is about being prepared to deal effectively with customer contact through social media platforms and using social media to satisfy customers by meeting their expectations. Do not choose this Standard if your organisation does not expect you to make routine and regular use of social media for customer service.

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Performance criteria

Use a social media platform effectively

- You must be able to:*
- P1 scan social media exchanges to identify relevant customer communications
 - P2 respond to direct queries or requests through social media communications following organisational guidelines
 - P3 explain your services or products and your organisation's service offer clearly and concisely to your customer
 - P4 adapt your response using social media to your customer's precise needs
 - P5 anticipate your customer's requests and needs for information
 - P6 respond to social media communications and requests within organisational response time guidelines

Establish a rapport with customers using social media

- You must be able to:*
- P7 present a professional and respectful image when dealing with your customer
 - P8 ensure that you interpret your customer's feelings from the tone and approach of their postings
 - P9 respond to your customer in a way that shows you understand their feelings
 - P10 follow the conventions of the chosen social media platform when responding to customers

Deal effectively with customer questions and requests

- You must be able to:*
- P11 search social media sources to identify customer questions and requests
 - P12 use direct and effective questions to clarify your customer's requests
 - P13 give clear and concise information in response to questions and requests
 - P14 check the security settings of the social media platform if you make a private response to a customer
 - P15 ensure that no further response is expected by your customer when dealing with a closing contact
 - P16 take customer service opportunities to impress any other members of a social media community who see how you dealt with your customer

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Knowledge and understanding

You need to know and understand:

- K1 your organisation's guidelines for dealing with customers through social media
- K2 ways to communicate customer service information to social media communities
- K3 how to search social media sources for postings by customers
- K4 how to anticipate your customer's requests and needs
- K5 the importance of interpreting your customer's feelings and perceptions from postings on social media networks
- K6 the conventions of social media platforms your customers choose to use
- K7 the importance of sending clear and concise messages when using social media platforms
- K8 how to control access to exchanges with customers using social media security settings
- K9 what details to share with a colleague if more than one of you become involved in exchanges with a customer using social media
- K10 how to recognise what should be the closing step in a series of social media exchanges with a customer

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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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