CFACSD4 (SQA Unit Code – H9YK 04)
Support customers using on-line customer services

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 on-line services. Customer service delivered on-line leaves a customer isolated and reliant on screen routes and instructions. A customer may seek help face to face or by telephone. That help will involve you in understanding what your customer is trying to achieve, how the system allows for that and what point they have reached in terms of finding the right route. Difficulties can arise if the system fails or if your customer is unable to discover how it can deliver what they want. This Standard is for you if one part of your job involves helping customers to find their way through on-line systems.

CFACSD4 (SQA Unit Code – H9YK 04)
Support customers using on-line customer services

Performance criteria	**Establish the type and level of support your customer needs to achieve on-line customer service**

You must be able to:

P1   ensure that you are completely familiar and up-to-date and with the on-line services that your customers use

P2   listen carefully to what your customer is trying to achieve

P3   listen carefully to what your customer is having difficulties with

P4   question your customer to discover their degree of familiarity with the system

P5   offer your customer the option of trying the on-line approach once more

P6   agree with your customer the exact nature of their problem and steps that may be taken to overcome it

Support on-line customer service in conversation with your customer

You must be able to:

P7   explore the on-line customer system in order to develop your own knowledge and skills in its use

P8   step through the screen sequence with your customer whilst allowing them to operate the system for themselves

P9   address your customer in an understanding and supportive manner P10 explain to your customer why certain steps are required in the process P11 offer the options to your customer of taking them through the process or completing the transaction yourself

P12 promote access to additional services or products when supporting customers on-line

Knowledge and understanding

K1   how your organisation's system for on-line service delivery works

K2   the importance of close active listening to discover what your customer is trying to achieve

K3   ways to communicate clearly with customers who have different levels of skills and understanding of the on-line system

K4   why it is generally preferable for your customer to complete a transaction for themselves

K5   the importance of building customer confidence in using the on-line system by supporting and encouraging

K6   the benefits and drawbacks of talking a customer through use of the system or completing the transaction yourself

K7   additional services or products that may be promoted to on-line customers

CFACSD4 (SQA Unit Code – H9YK 04)
Support customers using on-line customer services

Developed by	Skills CFA
Version number	2
Date approved	January 2013
Indicative review date	January 2016
Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSD4
Relevant occupations	Customer Service Occupations

CFACSD4 (SQA Unit Code – H9YK 04)
Support customers using on-line customer services

Suite	Customer Service (2013)
Key words	face to face; telephone; system failure; development; improvement; on-line; customer service; contact centres; improve; develop; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information