

CFACSF2 (SQA Unit Code – H9YX 04)

Deliver customer service within the rules



Overview

This standard is part of the Customer Service Theme of Customer Service Foundations. This Theme covers the language and concepts of Customer Service as well as the organisational context and the external environment in which you work. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

There are rules set by organisations about what you can and cannot do for customers. Some of those rules are the result of general responsibilities set by legislation and apply to everybody. Other rules are specific to an industry so are followed by your organisation because of the business you are in. Some rules are set by your organisation alone because of the particular way it wants its customer service to be delivered. This standard requires you to show that you know and understand all the rules that apply to customer service delivered by your organisation and how they apply to you and your job.

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Performance criteria

Follow your organisation's customer service practices and procedures

You must be able to:

- P1 follow organisational practices and procedures that relate to your customer service work
- P2 recognise the limits of what you are allowed to do when delivering customer service
- P3 refer to somebody in authority when you need to
- P4 work in a way that protects the security of customers and their property
- P5 work in a way that protects the security of data relating to customers

Follow legislation and external regulation that relate to customer service

You must be able to:

- P6 work in a way that is safe for your customers and your colleagues
- P7 treat customers equally
- P8 respect confidentiality relating to customers and the organisation
- P9 work in a way that shows you are aware of the areas of your job that are covered by legislation and the things you must not do
- P10 work in a way that shows you are aware of the main external regulations that apply to your job and the things you must not

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Knowledge and understanding

You need to know and understand:

- K1 organisational practices and procedures that relate to your customer service work
- K2 the limits of what you are allowed to do when delivering customer service
- K3 when and how you should refer to somebody in authority about the rules for delivering customer service
- K4 how you protect the security of customers and their property
- K5 how you protect the security of information about customers
- K6 your health and safety responsibilities as they relate to your customer service work
- K7 your responsibilities to deliver customer service whilst treating customers equally
- K8 why it is important to respect customer and organisation confidentiality
- K9 the main things you must do and not do in your job under legislation that affects your customer service work
- K10 the main things that you must do and not do in your job under external regulations that affect your customer service work

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Suite

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