

National Unit Specification: general information

UNIT Contact Centre Skills: Customer Care 2 (Intermediate 2)

CODE DN8J 11

COURSE

SUMMARY

This Unit is designed to provide the candidate with skills in responding to customer needs and will reflect the importance of interpersonal communication and efficient use of technology in developing relationships with contact centre customer satisfaction. It is intended for candidates who are undertaking a Scottish Progression Award in Contact Centre Skills. It may also be used as a stand-alone Unit.

OUTCOMES

1. Identify customer needs.
2. Respond to customer needs using Information and Communication Technology.
3. Develop positive relationships with customers.
4. Deal with customer dissatisfaction.

RECOMMENDED ENTRY

Entry to this Unit is at the discretion of the centre. It may, however, be beneficial for candidates to have achieved a Customer Care unit at SCQF level 4.

CREDIT VALUE

1 credit at Intermediate 2 (6 SCQF credit points at SCQF level 5*)

**SCQF credit points are used to allocate credit to qualifications in the Scottish Credit and Qualifications Framework (SCQF). Each qualification in the Framework is allocated a number of SCQF credit points at an SCQF level. There are 12 SCQF levels, ranging from Access 1 to Doctorates.*

CORE SKILLS

There is no automatic certification of core skills or core skills components.

Administrative Information

Superclass: BA

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National Unit Specification: statement of standards

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OUTCOME 1

Identify customer needs.

Performance Criteria

- (a) Use active telephone communication techniques.
- (b) Identify customer needs.
- (c) Capture accurate data simultaneously on a database.
- (d) Gather specified customer satisfaction information.
- (e) Comply with relevant legislation and regulations.
- (f) Maintain and communicate organisational image.

Evidence Requirements

Performance evidence that the candidate meets the standards defined by the performance criteria by identifying customer needs for a minimum of three different contacts covering three different types of situation. The candidate must record relevant details on a database at the same time as dealing with the customer.

Evidence will be in the form of an observation checklist supported by electronic data records.

OUTCOME 2

Respond to customer needs using Information and Communication Technology

Performance Criteria

- (a) Use and control telephony features.
- (b) Use available technology to locate appropriate information.
- (c) Demonstrate product knowledge.
- (d) Respond to customer using an effective channel of communication.
- (e) Comply with organisational requirements.

Evidence Requirements

Performance evidence that the candidate meets the standards defined by the performance criteria by undertaking a minimum of three fact finding electronic searches for and effectively conveying accurate information to the customer.

Evidence will be in the form of an observation checklist supported by electronic data records.

OUTCOME 3

Develop positive relationships with customers.

Performance Criteria

- a) Respond promptly to enquiries.
- b) Provide accurate relevant information.
- c) Clarify and confirm understanding in a sensitive and helpful manner.
- d) Adapt tone, register and language to meet the needs of customers.
- e) Give verbal and non verbal feedback to progress communication.
- f) Keep customers informed of progress.

National Unit Specification: statement of standards (cont)

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Evidence Requirements

Performance evidence that the candidate meets the standards defined by the performance criteria by developing positive rapport with a minimum of three different customers, at least one of whom has particular needs, using telephone and information technology communications.

Evidence will be in the form of an observation checklist and witness testimony supported by electronic data records.

OUTCOME 4

Deal with customer dissatisfaction.

Performance Criteria

- (a) Identify reason(s) for customer dissatisfaction.
- (b) Handle issues within organisational procedures.
- (c) Work with customer to resolve issues.
- (d) Explain action taken to customers.
- (e) Maintain accurate electronic files.

Evidence Requirements

Performance evidence that the candidate meets the standards defined by the performance criteria by handling customer dissatisfaction for at least three different contacts.

Evidence will be in the form of an observation checklist supported by electronic data records.

National Unit Specification: support notes

UNIT Contact Centre Skills: Customer Care 2 (Intermediate 2)

This part of the Unit Specification is offered as guidance. The support notes are not mandatory.

While the exact time allocated to this Unit is at the discretion of the centre, the notional design length is 40 hours.

GUIDANCE ON THE CONTENT AND CONTEXT FOR THIS UNIT

The Unit is intended for candidates following a course of study and programmed activities in contact centre skills. It has been identified as one of six Units which will contribute towards a Scottish Progression Award in *Introductory Contact Centre Skills*.

GUIDANCE ON LEARNING AND TEACHING APPROACHES FOR THIS UNIT

If this Unit is delivered as part of a group award, it is recommended that it should be taught and assessed within the subject area of the group award to which it contributes.

The learning and teaching approaches to this Unit should be directly linked to a series of activities and exercises enabling candidates to experience situations where they will develop skills in providing a service delivery. This will involve complying with organisational and legislative requirements and addressing customer needs whilst using appropriate technology. Candidates need a broad understanding of the importance of data protection, but not a detailed knowledge of the law. The focus at this level will be on following the organisational requirements for customer care as defined by the organisation. These must include procedures and processes for compliance with all relevant legislation or regulations.

Outcome 1

Knowledge and skills required will include

- ◆ how to log information and deal with/initiate service requests
- ◆ authorisation procedures, how to confirm identity and validate requests
- ◆ active listening techniques to progress communication
- ◆ the importance of presenting a positive image and
- ◆ gathering customer service information

Outcome 2

Knowledge and skills will include

- ◆ skills in using and controlling telephony features such as hold, transfer, conference, mute and system functions
- ◆ skills in data capture and effective organisation of information

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- ◆ methods and appropriate mode of response for each situation. An inbound telephone query may be handled fully over the telephone, or it may be more appropriate in some cases to also send a written (email, fax) response, for example where a written quote is called for, or where the information/advice is complicated or involves figures.
- ◆ how to access, select and make appropriate use of information held on computer, including the internet and intranet

Outcome 3

Active communication techniques for developing positive working relationships orally and/or in writing will include:

- ◆ use of key words and avoidance of jargon
- ◆ clear enunciation, phonetic language
- ◆ clarifying understanding, by paraphrasing and repetition
- ◆ being aware of and minimising potential barriers to effective communication, such as lack of focus, distractions
- ◆ methods of assisting customers with particular needs (for example, physical needs such as hearing impairment, language and cultural differences). Techniques of sensitive questioning, pacing, and rephrasing delivery, and understanding of facilities such as, for example, typetext, textphone and Braille.
- ◆ effective listening techniques, interpreting and responding to verbal and non-verbal signals
- ◆ adapting tone, language, register and response method to reflect needs of the customer
- ◆ questioning techniques (open, leading, sensitive, probing), inferring feelings and adapting questioning to respond appropriately
- ◆ non-verbal feedback, tone, smiling and having alert posture while on the telephone

Outcome 4

At this level the focus will be on handling difficulties in a pleasant and sensitive manner, and working with the customer to resolve routine issues within the limits of authority and organisational procedures

Knowledge and skills will include

- ◆ types of dissatisfaction –product, service-and appropriate responses

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- ◆ using techniques to diffuse potentially volatile situations –calm and measured tone, reassuring manner, on-going explanations of actions
- ◆ constructive approaches to problem solving
- ◆ delivering difficult messages to customers
- ◆ organisational procedures
- ◆ relevant legislation
- ◆ most effective form and style of communication
- ◆ limits and lines of authority, when to refer/ escalate
- ◆ presenting information in a positive manner, identifying benefits
- ◆ recording methods, methods of identifying key issues or details
- ◆ balancing the needs of the customer and the company, optimising call times as appropriate, assertive behaviour
- ◆ methods and appropriate mode of response for each situation. An inbound telephone query may be handled fully over the telephone, or it may be more appropriate to also send a written (email, fax) response, for example where a written quote is called for, or where the information/advice is complicated or involves figures.
- ◆ appropriate use of internet, intranet, co-browsing, webchat, other information held on computer
- ◆ importance of presenting a positive image and first impressions (behaviour, maintaining enthusiastic manner), benefits of customer care in relation to business objectives

Customer dissatisfaction:

- ◆ types of dissatisfaction –product, service-and appropriate responses
- ◆ organisational procedures
- ◆ dealing with stress and stressful and difficult situations
- ◆ techniques for dealing with angry and confused customers, diffusing difficult situations, withstanding criticism, handling objections
- ◆ appropriate forms of communication and tone covering telephone, email, fax
- ◆ limits and lines of authority, when to refer
- ◆ appropriate legislation

National Unit Specification: support notes (cont)

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GUIDANCE ON APPROACHES TO ASSESSMENT FOR THIS UNIT

For all assessments:

- ◆ the assessment of performance should be as natural and efficient as possible and therefore some evidence of competence should come from assessors and/or others acting as ‘expert witnesses’. Detailed observation checklists, witness testimony and peer and self assessment may all provide appropriate performance evidence
- ◆ written evidence should arise naturally from tasks and activities appropriate to the workplace, such as copies of electronic files, work logs, e-mail, contact reports and job sheets.
- ◆ ephemeral evidence, for example of decision taking, could be cross checked by oral questioning and backed up by brief written evidence – for example in the form of annotations to observation checklists

There are opportunities for integration with assessment of other Units in the award.

The use of simulation in a realistic workplace environment is acceptable where performance evidence in the workplace is unobtainable.

CANDIDATES WITH ADDITIONAL SUPPORT NEEDS

This Unit Specification is intended to ensure that there are no artificial barriers to learning or assessment. The additional support needs of individual candidates should be taken into account when planning learning experiences, selecting assessment instruments or considering alternative Outcomes for Units. For information on these, please refer to the document *Guidance on Assessment Arrangements for Candidates with Disabilities and/or Additional Support Needs* (SQA, 2004).