

**Unit D3XE 04 (2R9)**

**Resolve customer service problems**

This Unit has the following elements:

**Element 1 (2R9.1)**

**Identify customer service problems**

**Element 2 (2R9.2)**

**Select the best solution to resolve customer service problems**

**Element 3 (2R9.3)**

**Implement the solution to customer service problems**

**Candidate Name:**

**Assessment Centre:**

*I have completed the requirements of this Unit.*

**Candidate signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

*I can confirm the candidate has completed all requirements of this Unit.*

**Assessor signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Assessor counter signature:**  
(where applicable) \_\_\_\_\_ **Date:** \_\_\_\_\_

**IV signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**IV counter signature:**  
(where applicable) \_\_\_\_\_ **Date:** \_\_\_\_\_

## Unit D3XE 04 (2R9)

## Resolve customer service problems

### Unit Summary

The delivery of excellent customer service involves meeting and exceeding customer expectations. However, even if your customer service overall is excellent, some customers will experience problems. Part of your job is to help to resolve those problems. Some problems are reported by customers. In other situations, you spot the problem first and resolve it before your customer has even noticed that there might be a problem. For this Unit you need to resolve both types of problem having looked at all the options. The Unit is particularly important to customer service because many customers judge the customer service of your organisation by the way in which their problems are resolved.

This Unit is the same as the Institute for Customer Service Unit 4, level 2.

The typical day-to-day activities you might carry out for this Unit include:

- ◆ finding out about customers' problems
- ◆ coming up with possible solutions and discussing these with customers
- ◆ working with others to solve customer problems

### Evidence requirements for the Unit.

Simulation is not allowed for any performance evidence within this Unit. You must supply all the evidence from work you have carried out with customers in your workplace. Your customers can be internal or external to the organisation or a combination of both.

You must prove that you have dealt effectively with a series of customer service problems. You must produce evidence that shows you have done this over a period of time with different customers on different occasions.

Your evidence must include examples of solving problems involving each of the following:

- ◆ problems first identified by customers
- ◆ problems that you have identified before they affect your customer
- ◆ problems due to differences between your customers' expectations and what your organisation can offer
- ◆ problems due to a system or procedure failure
- ◆ problems due to a lack of resources or human error

Your evidence will need to show that you:

- ◆ have made positive efforts to keep your customers informed at all times while problems are being resolved
- ◆ supplied relevant information tactfully when customers have requested it
- ◆ supplied relevant information tactfully when customers have not requested it
- ◆ have used agreed organisational procedures when solving problems
- ◆ have made exceptions to usual practice with the agreement of others

All options you have considered must be based on the existing products or services offered by your organisation.

Your evidence must show that you have applied the knowledge and understanding requirements when you are dealing with your customers.

**Unit D3XE 04 (2R9)****Resolve customer service problems****Element 1 (2R9.1)****Identify customer service problems**

<b>What you must do</b>		<b>Assessor initials/date</b>
Evidence should be gathered through observation, products of work, projects, questioning, work-based assignments, and expert witness testimony		
1	Gather and interpret information from your customers about problems they have raised	
2	Ask your customers appropriate questions to check your understanding of their problems	
3	Identify repeated problems and alert the appropriate authority	
4	Share customer feedback with others to help identify potential problems before they occur	
5	Work independently or with others to identify problems with systems and procedures before they begin to affect your customers	

**Unit D3XE 04 (2R9)****Resolve customer service problems****Element 1 (2R9.1)****Identify customer service problems**

<b>Candidate name:</b>		<b>Assessor initials/date</b>
<b>No</b>	<b>Activity</b>	
1		
2		
3		
4		
5		
6		

**Unit D3XE 04 (2R9)****Resolve customer service problems****Element 2 (2R9.2)****Select the best solution to resolve customer service problems**

<b>What you must do</b>		<b>Assessor initials/date</b>
Evidence should be gathered through observation, products of work, projects, questioning, work-based assignments, and expert witness testimony		
1	Identify the available options for resolving customer service problems	
2	Consult with others to identify and confirm the options available to resolve those problems	
3	Work out the advantages and disadvantages of each option for your customer and your organisation	
4	Select the best overall option for your customer and your organisation	
5	Suggest to your customer other ways that problems may be resolved if you are unable to help	

**Unit D3XE 04 (2R9)**

**Resolve customer service problems**

**Element 2 (2R9.2)**

**Select the best solution to resolve customer service problems**

<b>Candidate name:</b>		<b>Assessor initials/date</b>
<b>No</b>	<b>Activity</b>	
1		
2		
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**Unit D3XE 04 (2R9)****Resolve customer service problems****Element 3 (2R9.3)****Implement the solution to customer service problems**

<b>What you must do</b>		<b>Assessor initials/date</b>
Evidence should be gathered through observation, products of work, projects, questioning, work-based assignments, and expert witness testimony		
1	Discuss and agree the proposed option for solving the problem with your customers	
2	Take action to implement the option agreed with your customers	
3	Work with others and your customers to make sure that any commitments related to solving the problem are kept	
4	Keep your customers fully informed about what is happening to resolve problems	
5	Check with your customers to make sure the problem has been resolved to their satisfaction	
6	Give clear reasons to your customers when the problem has not been resolved to their satisfaction	

**Unit D3XE 04 (2R9)**

**Resolve customer service problems**

**Element 3 (2R9.3)**

**Implement the solution to customer service problems**

<b>Candidate name:</b>		<b>Assessor initials/date</b>
<b>No</b>	<b>Activity</b>	
1		
2		
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**Unit D3XE 04 (2R9)****Resolve customer service problems**

<b>What you must know for the Unit</b>	
<b>For the whole Unit</b>	
K1	What your customers' rights are and how these rights limit what you are able to do for your customer
K2	The specific aspects of health and safety, data protection, equal opportunities, disability discrimination and legislation and regulations that affect the way the products or services you deal with can be delivered to your customers
K3	Industry, organisational and professional codes of practice and ethical standards that affect the way the products or services you deal with can be delivered to your customers
K4	Any contractual agreements that your customers have with your organisation
K5	The products or services of your organisation relevant to your customer service role
K6	The guidelines laid down by your organisation that limit what you can do within your job
K7	The limits of your own authority and when you need to seek agreement with or permission from others
K8	Any organisational targets relevant to your job, your role in meeting them and the implications for your organisation if those targets are not met
K9	How to communicate in a clear, polite, confident way and why this is important
K10	Organisational procedures and systems for dealing with customer service problems
K11	How to defuse potentially stressful situations
K12	How to negotiate
K13	The limitations of what you are able to offer your customer

Knowledge evidence retained

**Assessor signature:** \_\_\_\_\_**Date:** \_\_\_\_\_

**Unit D3XE 04 (2R9)****Resolve customer service problems**

Candidate name:		Assessor initials/date
Ref	Supplementary evidence	
A		
B		
C		
D		
E		
F		
G		
H		

Assessor Feedback