

FE25 04 (CFACSA6) Process Information about Customers

This Unit has the following Elements:

- A6.1 Collect information about customers.
- A6.2 Select and retrieve information about customers.
- A6.3 Supply information about customers.

Unit Summary

This Unit is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have the 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.

You and your organisation need information about your customers and their behaviour to answer customer questions and to respond to customer requests. Information about customers is also used by your organisation to develop its customer service. Some customer information is collected from your customers. Other customer information is collected through information systems and equipment that make records of service delivery. In either case you must collect information, retrieve it and supply it when needed. Good customer information provides a sound basis for all customer service transactions. The quality of the customer information depends heavily on the skills and attention to detail of the person dealing with the information.

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A6.1 Collect information about customers

Performance Criteria

You must consistently:

- A6.1.1 Collect and record new information about customers following your organisation's guidelines.
- A6.1.2 Update existing information about customers.
- A6.1.3 Record and store information about customers that is accurate, sufficient and relevant following organisational guidelines.

A6.2 Select and retrieve information about customers

Performance Criteria

You must consistently:

- A6.2.1 Respond promptly to authorised requests for information about customers.
- A6.2.2 Select and retrieve relevant information for customers or colleagues following your organisation's guidelines.

A6.3 Supply information about customers

Performance Criteria

You must consistently:

- A6.3.1 Supply accurate and sufficient information about customers to meet your customers or colleagues' expectations.
- A6.3.2 Choose the most appropriate way to supply information to your customers or colleagues.
- A6.3.3 Confirm that your customers or colleagues have received and understood the customer information.

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Knowledge and Understanding for the whole Unit

To be competent at processing customer service information you need to know and understand:

- A6a Your organisation's procedures and guidelines for collecting, retrieving and supplying information about customers.
- A6b Types of personal information about customers that should and should not be kept on record.
- A6c How to collect information about customers efficiently and effectively.
- A6d How to operate the customer information storage system.
- A6e Why processing information about customers correctly makes an important contribution to effective customer service.
- A6f The importance of attention to detail when processing information about customers.
- A6g Legal and regulatory restrictions on the storage and use of customer data.

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Evidence Requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. *(Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service at S/NVQ Levels 1, 2, 3 and 4 — July 2010)*
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
- 5 You must provide evidence that you have processed information relating to:
 - a new customers
 - b existing customers.
- 6 Your evidence must show that you have:
 - a checked whether the information you are collecting and retrieving is accurate and up-to-date
 - b selected information that is directly relevant to each of your customers.

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Candidate Recording Form

		Performance Criteria							
No	Description of evidence	A6.1.1	A6.1.2	A6.1.3	A6.2.1	A6.2.2	A6.3.1	A6.3.2	A6.3.3

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No	Description of evidence	Knowledge and Understanding						
		A6a	A6b	A6c	A6d	A6e	A6f	A6g

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Notes/Comments

The candidate has satisfied the assessor and internal verifier that the performance evidence has been met.

Candidate's signature _____ **Date** _____

Assessor's signature _____ **Date** _____

Internal verifier's signature _____ **Date** _____