

Unit: CS6 Provide callers with specialised assistance in a financial services environment

Overview

To achieve this Standard you show that you are able to assist callers who require specialist assistance. This may mean technical IT assistance (e.g. in dealing with internet banking) or specialist financial services assistance. The standard covers both providing assistance and getting other specialists to assist the caller.

Outcomes of effective performance

- CS6/O1 You follow your organisation's procedures to confirm the caller's perceptions of the specialist assistance that they are seeking
- CS6/O2 You assess the information provided by the caller in sufficient detail to decide the most appropriate action to take
- CS6/O3 Where there are a range of possible actions, you inform the caller of these and their implications
- CS6/O4 You agree with the caller the nature and extent of specialist assistance required to meet their needs
- CS6/O5 You provide specialist assistance which is appropriate to the caller's needs and within your authority and knowledge
- CS6/O6 When the specialist assistance required does not meet the caller's needs, you direct them to the relevant person for further assistance
- CS6/O7 When the specialist assistance required is outside your knowledge or authority, you contact the relevant person to establish the next step
- CS6/O8 Where problems are encountered in providing the assistance required, you take further action through implementing approved procedures
- CS6/O9 You record the information gathered and the assistance offered accurately and completely in line with your organisation's procedures

- CS6/O10 You comply with legal requirements, industry regulations, organisational policies and professional codes

Behaviours which underpin effective performance

- CS6/B1 You deal with callers in a manner and at a pace to suit the needs of the caller
- CS6/B2 You use appropriate questions to collect information
- CS6/B3 You maintain confidentiality of information when this is required
- CS6/B4 You present information clearly, concisely, accurately and in ways that promote understanding
- CS6/B5 You make complex things simple for the benefit of others
- CS6/B6 You demonstrate a clear understanding of different customers and their real and perceived needs
- CS6/B7 You carry out tasks with due regard to your organisation's policies and procedures, including those covering health and safety at work

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Knowledge and understanding

- 1 When to use the different types of questioning of open, closed and probing questions, according to the information being sought, and the requirements of different callers
- 2 How to assess how much information is required before effective assistance can be provided
- 3 How to analyse the information being provided and how to use this to explore options for addressing callers' needs
- 4 Typical types of assistance sought by callers and how to assess and address these
- 5 The importance of effective listening, and how to apply this, including techniques which demonstrate that you are taking an active interest and which encourage callers' effective participation in calls
- 6 Why, in order to maintain positive relationships with callers, it is important to adapt your choice of words and adopt an appropriate manner which takes into account the needs and specialist experience of callers
- 7 A good and up to date specialist knowledge of the products/services for which you have responsibility
- 8 Your levels of responsibility, and to whom to refer when such levels are exceeded
- 9 The importance of time management, and how to use this effectively in balancing the needs of callers with those of your organisation
- 10 Your organisation's call handling standards relating to the quality of calls and the service provided
- 11 Your organisation's requirements relating to the application of codes, laws and regulatory requirements, including health and safety, as they impact on your activities