

## **FE20 04 (CFACSB7) Deal with Customers Using Bespoke Software**

This Unit has the following Elements:

- B7.1 Prepare to deliver customer service using bespoke software.
- B7.2 Deliver customer service using bespoke software.

### **Unit Summary**

This Unit is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

Customer service is often delivered using bespoke software when dealing with customers face-to-face, by telephone or on-line. For the process to be effective, you must be able to navigate the system quickly and directly following recommended routes and using all the functionality of the system. Customers are unaware of the details of the system you are using and they must be kept informed of the different steps you are taking. Your use of the system must also ensure that you keep appropriate records of the transaction so that it can proceed successfully through the next stages. Most of all, customer satisfaction must drive the interaction and it should not appear to be dominated by the demands of the software. This Unit is for you if you are responsible for delivering service to customers at the same time as operating bespoke service software.

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### B7.1 Prepare to deliver customer service using bespoke software

#### Performance Criteria

*You must consistently:*

- B7.1.1 Sign on and open access to appropriate functions in the IT system.
- B7.1.2 Navigate the architecture and geography of the customer service site to ensure you can access all appropriate areas.
- B7.1.3 Explore screen or menu routes that are most appropriate for the customer service you are seeking to deliver.
- B7.1.4 Ensure that you are familiar with the software manual, help screens or help lines to know where to locate technical support when needed.
- B7.1.5 Prepare your work area to deliver customer service using bespoke software.

### B6.2 Deliver customer service using bespoke software

#### Performance Criteria

*You must consistently:*

- B7.2.1 Identify your customer or the services or products they wish to access.
- B7.2.2 Follow organisational procedures to step through the system in a way that responds to your customer's needs.
- B7.2.3 Use search or other specialist functions within the software to respond to customer requests.
- B7.2.4 Enter new records using the bespoke software system.
- B7.2.5 Amend customer service records in the bespoke software system.
- B7.2.6 Communicate with your customers in terms they can understand relating to the software system.
- B7.2.7 Follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software.
- B7.2.8 Interpret error messages and act on them to support your customer service.
- B7.2.9 Refer your customer to a colleague following organisational procedures if you are unable to complete the transaction.

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### **Knowledge and Understanding for the whole Unit**

*To be competent at dealing with customers using bespoke software you must know and understand:*

- B7a Access and sign-on routines for the bespoke software system.
- B7b The architecture and geography of the bespoke software system.
- B7c Different screen or menu routes that can be followed to meet customer requirements.
- B7d Sources of support and help for the bespoke software including manuals, help screens and help lines.
- B7e The importance of preparing a work area before delivering customer service.
- B7f Search or other enquiry facilities within the bespoke software system.
- B7g The importance of avoiding jargon and system terminology when communicating with customers.
- B7h Ways to respond to error messages when using a bespoke software system.
- B7i Referral points and sources of information when you are unable to meet customer needs using the bespoke software system.

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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 S/NVQs at 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 of dealing with customers using bespoke software:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job
  - d when people, systems or resources have let you down.





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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** \_\_\_\_\_