

FE2L 04 (CFACSD4) Support Customers Using On-line Customer Services

This Unit has the following Elements:

- D4.1 Establish the type and level of support your customer needs to achieve on-line customer service.
- D4.2 Support on-line customer service in conversation with your customer.

Unit Summary

This Unit is part of the Customer Service Theme of Development and Improvement. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

Many organisations develop their customer service by directing customers towards on-line services. Customer service delivered on-line leaves a customer isolated and reliant on screen routes and instructions. A customer may seek help face to face or by telephone. That help will involve you in understanding what they are trying to achieve, how the system allows for that and what point they have reached in terms of finding the right route. Difficulties can arise if the system fails or if your customer is unable to discover how it can deliver what they want. This Unit is for you if one part of your job involves helping customers to find their way through on-line systems.

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D4.1 Establish the type and level of support your customer needs to achieve on-line customer service

Performance Criteria

You must consistently:

- D4.1.1 Ensure that you are completely familiar and up-to-date and with the on-line services that your customers use.
- D4.1.2 Listen carefully to what your customer is trying to achieve.
- D4.1.3 Listen carefully to what your customer is having difficulties with.
- D4.1.4 Question your customer to discover their degree of familiarity with the system.
- D4.1.5 Offer your customer the option of trying the on-line approach once more.
- D4.1.6 Agree with your customer the exact nature of their problem and steps that may be taken to overcome it.

D4.2 Support on-line customer service in conversation with your customer

Performance Criteria

You must consistently:

- D4.2.1 Explore the on-line customer system in order to develop your own knowledge and skills in its use.
- D4.2.2 Step through the screen sequence with your customer whilst allowing them to operate the system for themselves.
- D4.2.3 Address your customer in an understanding and supportive manner.
- D4.2.4 Explain to your customer why certain steps are required in the process.
- D4.2.5 Offer the options to your customer of stepping them through the process or completing the transaction yourself.
- D4.2.6 Promote access to additional services or products when supporting customers on-line.

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Knowledge and Understanding for the whole Unit

To be competent at supporting customers using on-line services you must know and understand:

- D4a How your organisation's system for on-line service delivery works.
- D4b The importance of close active listening to discover what your customer is trying to achieve.
- D4c Ways to communicate clearly with customers who have different levels of skills and understanding of the on-line system.
- D4d Why it is generally preferable for your customer to complete a transaction for themselves.
- D4e The importance of building customer confidence in using the on-line system by supporting and encouraging.
- D4f The benefits and drawbacks of talking a customer through use of the system or completing the transaction yourself.
- D4g Additional services or products that may be promoted to on-line customers.

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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 — February 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.
- 5 You must provide evidence of supporting customers who are:
 - a new to the use of on-line services for this particular purpose
 - b familiar with the use of on-line services for this particular purpose
- 6 Your evidence must include examples of helping customers with difficulties caused by:
 - a the customer's use of the on-line services
 - b a system or equipment failure.

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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** _____