

FE2M 04 (CFACSD5) Buddy a Colleague to Develop Their Customer Service Skills

This Unit has the following Elements:

- D5.1 Plan and prepare to buddy a colleague.
- D5.2 Support your buddy colleague on the job.
- D5.3 Provide buddy support off the job.

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.

In customer service roles it is often useful to have a 'buddy' relationship with somebody who has more experience of the same customer service situation. If you are asked to buddy a colleague who is learning customer service aspects of their job, you need to approach that responsibility in an organised way. This Unit is about how to be a good buddy by working alongside your colleague and providing them with constructive feedback and support. You do not need to be more senior than your colleague or their supervisor to act as a customer service buddy.

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D5.1 Plan and prepare to buddy a colleague

Performance Criteria

You must consistently:

- D5.1.1 Agree with your colleague aspects of their work which may benefit most from your buddying support.
- D5.1.2 Confirm your understanding of your colleague's job tasks and responsibilities using reliable sources.
- D5.1.3 Clarify the customer service image and impression your colleague should present in their job.
- D5.1.4 Arrange times when it will be most helpful to work alongside your colleague.
- D5.1.5 Plan details of a buddy session to support your colleague on the job.

D5.2 Support your buddy colleague on the job

Performance Criteria

You must consistently:

- D5.2.1 Agree with your colleague where you will be placed near them when buddying them on the job.
- D5.2.2 Ensure your presence when your buddy is dealing with customers does not detract from effective customer service.
- D5.2.3 Carry out customer service tasks in the presence of your buddy colleague to set an example they can follow.

D5.2 (continued)

- D5.2.4 Observe your colleague closely to identify what they do well and areas in which they could improve.
- D5.2.5 Discuss each customer transaction briefly when there is time available between dealing with customers to identify approaches that work well and areas for improvement.
- D5.2.6 Praise your colleague on aspects of their work which they have carried out well.
- D5.2.7 Explain to your colleague ways in which they can improve their customer service performance.
- D5.2.8 Make notes on your colleague's strengths and areas for development that you can discuss with them.

D5.3 Provide buddy support off the job

Performance Criteria

You must consistently:

- D5.3.1 Arrange suitable times to meet with your buddy colleague when they are not directly engaged with customers.
- D5.3.2 Identify areas of general interest that help to establish rapport with your buddy colleague.
- D5.3.3 Use notes made when observing your colleague to discuss positive and negative aspects of their performance.
- D5.3.4 Agree actions your buddy colleague can take to improve their customer service performance.
- D5.3.5 Offer hints and tips on effective customer service actions to your buddy colleague drawn from your own experience.

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Knowledge and Understanding for the whole Unit

To be competent at buddying a colleague to develop their customer service skills you must know and understand:

- D5a The tasks in your buddy colleague's job.
- D5b Areas of the job that benefit most from buddying support.
- D5c the customer service image and impression that should be presented in your buddy colleague's job.
- D5d The best times at which to work alongside your buddy colleague.
- D5e Ways to work alongside your buddy colleague without intruding on the customer relationship.
- D5f Techniques for giving positive feedback and constructive criticism to your buddy colleague.
- D5g The importance of establishing an effective rapport with your buddy colleague.
- D5h Options for actions your buddy colleague can take to improve their customer service performance.

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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.
- 4 You must provide evidence of buddying a colleague to develop their customer service skills:
 - 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** _____