

U13502**Process customer service information**

Unit Descriptor:

If you have chosen this optional unit your job must involve collecting and handling significant amounts of customer information.

You and your organisation need customer information to answer customer questions and respond to customer requests.

Your job may involve collecting customer information by actively asking for it from your customers. Alternatively, the systems and equipment that you operate may collect it for you. In either case you must collect the information, retrieve it and supply it when needed.

Good customer information provides a sound basis for all customer service transactions and this unit gives you the opportunity to show how your handling of that information contributes to delivering excellent customer service.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

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| 1. Collect, update and store customer service information | 1.1 Collect and record new customer service information from your customers in accordance with organisational guidelines. |
| | 1.2 Update existing customer service information with additional information received from your customers. |
| | 1.3 Record customer service information that is accurate, sufficient and relevant to the purpose for which it is needed. |
| | 1.4 Confirm the accuracy of information with your customers before it is recorded. |

- 1.5 Store customer service information where it is accessible to those who need it.
- 2. Select, retrieve and supply customer service information
 - 2.1 Respond promptly to requests for customer service **information**.
 - 2.2 Select and retrieve information that helps those who need it.
 - 2.3 Retrieve customer service information in accordance with organisational guidelines, accuracy, format and confidentiality.
 - 2.4 Supply accurate and sufficient customer service information to meet your customers' requests.
 - 2.5 Choose the most appropriate way to **supply information** to your customers.
 - 2.6 Confirm that your customers receive and understand all the customer service information you have supplied.
 - 2.7 Maintain the confidentiality of personal information in accordance with organisational guidelines and relevant legislation.

RANGE STATEMENT

You must cover the items below:

Element 1: Collect, update and store customer service information**A. Information for:**

- (i) new customers
- (ii) customers whose records need updating

Element 2: Select, retrieve and supply customer service information**A. Information for:**

- (i) customers
- (ii) others

B. Supply information:

- (i) in writing
- (ii) verbally
- (iii) electronically
- (iv) using images

UNDERPINNING KNOWLEDGE AND SKILLS**Legislation and regulations**

1. What are your customers' rights.
2. What are the specific aspects of:
 - a. health and safety
 - b. data protection
 - c. equal opportunities
 - d. disability discrimination, legislation and regulations that affect the way the products and services you deal with can be delivered to your customers
3. What are the industry, organisational and professional codes of practice and ethical standards that affect the way the products or services you deal with can be delivered to your customers.
4. What are the contractual agreements, if any, customers have with your organisation.

Products and services

5. What are the products or services of your organisation relevant to your customer service role.

Organisational procedures/guidelines

6. What are the guidelines laid down by your organisation that limits what you can do within your job.
7. What are the limits of your own authority and when do you need to seek agreement with or permission from others.
8. What are the organisational targets relevant to your job, your role in meeting them and the implications for your organisation if those targets are not met.

Communication

9. How would you communicate in a clear, polite, confident way and why this is important.

UNDERPINNING KNOWLEDGE AND SKILLS (continued)**Additional knowledge and understanding you need for unit 9**

10. What are the organisational procedures and systems for collecting, retrieving and supplying customer service information.
11. How would you collect customer service information efficiently and effectively.
12. How do you operate the customer information storage system.
13. Why does processing customer information correctly make an important contribution to effective customer service.

EVIDENCE GUIDE

For assessment purposes:

1. Critical Aspects of Evidence

You will need to show that you have collected, selected, retrieved and supplied customer service information over a period of time.

Performance Evidence

You must prove that you have processed customer information for a variety of customers with different needs.

You must show that you have processed information for:

- a. customers
- b. others

You must also show that you have:

- c. checked whether the information you are collecting and retrieving is accurate and up-to-date
- d. selected from a variety of information the parts that apply directly to each of your customers.

The information you supply can be in writing, verbally, electronically or by using images.

Your evidence must show that you have applied the knowledge and understanding requirements when you are processing customer service information.

2. Methods of Assessment

Performance Evidence for this unit could include:

- Observation report by your assessor recording how you are able to meet your customers' requests by selecting and retrieving accurate and sufficient information.
- Witness testimony from an appropriate person which provides evidence that you can effectively collect accurate customer service information.

Supplementary Evidence for this unit could include:

- Copies of records of customer information you have collected.
- Copies of communications sent in response to customers' requests.
- A professional discussion with your assessor using examples of different ways you have supplied information to various customers over a period of time.

3. Context of Assessment

Simulation is **not** allowed for any performance evidence within this unit. You must supply all the evidence from work you have carried out with customers in your workplace. Your customers can be internal or external to the organisation or a combination of both.

Organisations use different methods to store information including manual files and computerized storage. Your evidence must be demonstrated by using the method which is most appropriate for your organisation.