

Unit 219

Support customers through real-time online customer service

UAN:	A/506/2161
Level:	2
Credit value:	3
GLH:	15
Relationship to NOS:	This unit is linked to the Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none">• CFACSD4 Support customers using on-line customer services
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Skills CFA Assessment Strategy Competence units (S/NVQ)
Aim:	This unit aims to develop the knowledge and skills required to support customers through real-time online customer service. Upon completion of this unit, learners will be able to establish the customer service support needed by customers and support online customer service in real-time.

Learning outcome

The learner will:

1. understand how to support customers through real-time online customer service

Assessment criteria

The learner can:

- 1.1 explain how an organisation's **online customer service system** works
- 1.2 explain how to navigate their own customer service site
- 1.3 describe the **questioning techniques** that may be used when supporting customers through real-time on-line customer services
- 1.4 explain how to adapt their own **communication style** to meet customers' ability to use online systems.

Assessment guidance

Online customer service systems:

Can be any system being used by the organisation including live chat, video etc.

Questioning techniques:

- open – to obtain information
- probing – to obtain further information or clarify information given
- closed – what, where, why, when – which give answers of yes, no or very short responses. It is used for confirmation of understanding.

Communication style:

May mean adapting from a style that suits someone with the ability to use the service, to one who needs some help, to one never having used the service before. This will mean adapting the use of technical language depending on who they are dealing with and spending more time explaining the service to those who have not used it before.

Evidence may be supplied by:

- professional discussion
- questioning
- reflective account
- organisational policies and procedures*

Learning outcome

The learner will:

2. be able to establish the customer service support needed by customers

Assessment criteria

The learner can:

- 2.1 identify customers' familiarity with the site
- 2.2 identify the **difficulties** faced by customers when navigating websites
- 2.3 identify the support for customers that will meet their needs.

Assessment guidance

Difficulties:

eg

- lack of confidence
- lack of IT knowledge
- poor communication skills
- technical issues

Evidence may be supplied by:

- observation
- witness testimony

- customer records*
- professional discussion
- questioning
- reflective account
- frequently asked questions*
- manuals*
- service offer*
- documentation*
- legislation, organisational policies and procedures*

Learning outcome

The learner will:

3. be able to support online customer service in real-time

Assessment criteria

The learner can:

- 3.1 step through screen sequences while the customer operates the system
- 3.2 communicate with customers in terms they can understand
- 3.3 inform customers of what is happening and why certain steps are required
- 3.4 adhere to **organisational policies and procedures, legal and ethical requirements** when supporting customers through on-line customer service.

Assessment guidance

Organisational policies and procedures which relate to:

- roles and responsibilities showing limits of authority
- service offer
- data protection and confidentiality policy
- communication policy
- IT policy
- social media policy
- handling of customer issues
- customer service policy and procedures

Legal requirements:

eg

- Data Protection Act
- Equality Act
- Health and Safety at Work Act

Ethical requirements:

- organisational principles
- values
- fairness

Evidence may be supplied by:

- observation
- witness testimony

- customer records*
- professional discussion
- questioning
- reflective account
- frequently asked questions*
- manuals*
- service offer*
- documentation*
- legislation, organisational policies and procedures*.

Note: this unit is about supporting customers through real-time online customer service.

Here the candidate will require to be observed supporting a number of customers through real-time online customer service over time. Witness testimonies can be added if necessary.

* While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.