
Unit CU811 Deal With Customers Using Bespoke Software

Aims

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, the learner 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 they are using and they must be kept informed of the different steps the learner is taking. The use of the system must also ensure that the learner keeps 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 a learner who is responsible for delivering service to customers at the same time as operating bespoke service software.

Level: 2

Credit value: 5

| Learning outcomes | Assessment criteria |
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| The learner will: | The learner can: |
| 1. Prepare to deliver customer service using bespoke software | <ul style="list-style-type: none">1.1 Sign on and open access to appropriate functions in the IT system1.2 Navigate the architecture and geography of the customer service site to ensure they can access all appropriate areas1.3 Explore screen or menu routes that are most appropriate for the customer service they are seeking to deliver1.4 Ensure that they are familiar with the software manual, help screens or help lines to know where to locate technical support when needed1.5 Prepare their work area to deliver customer service using bespoke software |

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| <p>2. Deliver customer service using bespoke software</p> | <p>2.1 Identify their customer or the services or products they wish to access</p> <p>2.2 Follow organisational procedures to step through the system in a way that responds to their customer's needs</p> <p>2.3 Use search or other specialist functions within the software to respond to customer requests</p> <p>2.4 Enter new records using the bespoke software system</p> <p>2.5 Amend customer service records in the bespoke software system</p> <p>2.6 Communicate with their customers in terms they can understand relating to the software system</p> <p>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</p> <p>2.8 Interpret error messages and act on them to support their customer service</p> <p>2.9 Refer their customer to a colleague following organisational procedures if they are unable to complete the transaction</p> |
| <p>3. Understand how to deal with customers using bespoke software</p> | <p>3.1 Describe access and sign-on routines for the bespoke software system</p> <p>3.2 Describe the architecture and geography of the bespoke software system</p> <p>3.3 Identify different screen or menu routes that can be followed to meet customer requirements</p> <p>3.4 Identify sources of support and help for the bespoke software including manuals, help screens and help lines</p> <p>3.5 Explain the importance of preparing a work area before delivering customer service</p> <p>3.6 Explain search or other enquiry facilities within the bespoke software system</p> <p>3.7 State the importance of avoiding jargon and system terminology when communicating with customers</p> |

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| | <p>3.8 Describe ways to respond to error messages when using a bespoke software system</p> <p>3.9 Identify referral points and sources of information when they are unable to meet customer needs using the bespoke software system</p> |
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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. 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.