

Unit CU798 Process Information About Customers

Aims

The learner and their organisation need information about their customers and their behaviour to answer customer questions and to respond to customer requests. Information about customers is also used by the organisation to develop its customer service. Some customer information is collected from customers. Other customer information is collected through information systems and equipment that make records of service delivery. In either case the learner must collect information, retrieve it and supply it when needed. Good customer information provides a sound basis for all customer service transactions. The quality of the customer information depends heavily on the skills and attention to detail of the person dealing with the information.

Level: 2

Credit value: 5

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Collect information about customers	1.1 Collect and record new information about customers following the organisation's guidelines 1.2 Update existing information about customers 1.3 Record and store information about customers that is accurate, sufficient and relevant following organisational guidelines
2. Select and retrieve information about customers	2.1 Respond promptly to authorised requests for information about customers 2.2 Select and retrieve relevant information for customers or colleagues following the organisation's guidelines
3. Supply information about customers	3.1 Supply accurate and sufficient information about customers to meet their customers' or colleagues' expectations 3.2 Choose the most appropriate way to supply information to their customers or colleagues 3.3 Confirm that their customers or colleagues have received and understood the customer information

<p>4. Understand how to process customer service information</p>	<p>4.1 Describe their organisation's procedures and guidelines for collecting, retrieving and supplying information about customers</p> <p>4.2 Identify types of personal information about customers that should and should not be kept on record</p> <p>4.3 Explain how to collect information about customers efficiently and effectively</p> <p>4.4 Explain how to operate the customer information storage system</p> <p>4.5 Explain why processing information about customers correctly makes an important contribution to effective customer service</p> <p>4.6 Explain the importance of attention to detail when processing information about customers</p> <p>4.7 Describe legal and regulatory restrictions on the storage and use of customer data</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 at S/NVQ 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 that you have processed information relating to:
 - a new customers
 - b existing customers.
6. Your evidence must show that you have:
 - a checked whether the information you are collecting and retrieving is accurate and up-to-date
 - b selected information that is directly relevant to each of your customers