

UNIT 217 (LEVEL 2 UNIT, 5 CREDITS)

DEAL WITH CUSTOMERS USING BESPOKE SOFTWARE

Elements in this unit

When you have completed this unit, you will have proved that you:

- 217.1** can prepare to deliver customer service using bespoke software
- 217.2** can deliver customer service using bespoke software
- 217.3** understand how to deal with customers using bespoke software.

You should note

- 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, email, internet (including social networking), intranet or by any other method you would be expected to use within your job role.

Assessed evidence

You need to show that you understand and are able to complete all the elements in this unit over a sufficient period of time, with different customers, on different occasions. Evidence may be gained through direct observation or products of work, recorded by your assessor and then referenced in the box below. On the next pages, these evidence references can be written in the relevant boxes of 'What you must cover', 'What you must do' and 'What you must know'.

Evidence reference	Evidence title	Assessment method

Assessment method key

O Observation **Q** Questioning **PE** Product Evidence
WT Witness Testimony **PD** Professional Discussion

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What you must cover

Evidence reference should be entered in the shaded areas below. You must cover **all** the points listed.

1 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.

What you must do

Evidence reference should be entered in the shaded areas below. You must do **all** the points listed.

217.1 To prepare to deliver customer service using bespoke software, you must:

217.1.1 sign on and open access to appropriate functions in the IT system

217.1.2 navigate the architecture and geography of the customer service site to ensure you can access all appropriate areas

217.1.3 explore screen or menu routes that are most appropriate for the customer service you are seeking to deliver

217.1.4 ensure that you are familiar with the software manual, help screens or help lines to know where to locate technical support when needed

217.1.5 prepare your work area to deliver customer service using bespoke software.

217.2 To deliver customer service using bespoke software, you must:

217.2.1 identify your customer or the services or products they wish to access

217.2.2 follow organisational procedures to step through the system in a way that responds to your customer's needs

217.2.3 use search or other specialist functions within the software to respond to customer requests

217.2.4 enter new records using the bespoke software system

217.2.5 amend customer service records in the bespoke software system

217.2.6 communicate with your customers in terms they can understand relating to the software system

217.2.7 follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software

217.2.8 interpret error messages and act on them to support your customer service

217.2.9 refer your customer to a colleague following organisational procedures if you are unable to complete the transaction.

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What you must know

Evidence reference should be entered in the shaded areas below. You must know **all** the points listed.

217.3 To understand how to deal with customers using bespoke software, you must be able to:

217.3.1 describe access and sign-on routines for the bespoke software system

217.3.2 describe the architecture and geography of the bespoke software system

217.3.3 identify different screen or menu routes that can be followed to meet customer requirements

217.3.4 identify sources of support and help for the bespoke software, including manuals, help screens and help lines

217.3.5 explain the importance of preparing a work area before delivering customer service

217.3.6 explain search or other enquiry facilities within the bespoke software system

217.3.7 state the importance of avoiding jargon and system terminology when communicating with customers

217.3.8 describe ways to respond to error messages when using a bespoke software system

217.3.9 identify referral points and sources of information when you are unable to meet customer needs using the bespoke software system.

Unit sign-off

The evidence for this unit is valid, sufficient and an authentic record of the candidate's current competence and has been assessed under the requirements of the assessment strategy.

I confirm that the evidence provided is a result of my own work.

Signature of candidate	Date
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I confirm that the candidate has demonstrated competence by satisfying all of the criteria for this unit.

Signature of assessor	Date
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Countersignature of assessor	Date
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Signature of IV (if sampled)	Date
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Countersignature of IV	Date
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Signature of EV (if sampled)	Date
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