



UNIT 303

DEAL WITH CUSTOMERS IN WRITING OR ELECTRONICALLY

This unit is all about communicating with customers in writing or electronically. The unit sits within the customer service theme of Impression and Image. This theme covers the organisational behaviours and processes that affect how your customers see you and your organisation.

WHY CUSTOMER SERVICE MATTERS TO... A PLUMBER

Plumbers should maintain permanent records of communication with customers on quotations and work completed. They may also need to produce flyers or advertising materials and respond to customer communication. The purpose of written communication needs to be clear and all written communication should be in a language that your customers will understand.

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. Evidence collected in a realistic working environment or a work placement is not permissible for this unit. 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 in writing, by text message, email, internet (including social networking), intranet or by any other method you would be expected to use within your job role providing that there is a permanent record of your communication with your customers.



is for confidentiality

Information about customers must be kept confidential and be dealt with according to the requirements of data protection legislation. Customers will not be happy if their information is used inappropriately or is given to people who are not authorised to have it.

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 |
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Assessment method key

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

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DEAL WITH CUSTOMERS IN WRITING OR ELECTRONICALLY

What you must cover

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

1 Your evidence must include examples of dealing with customers who:

- a have routine expectations of your organisation's customer service

- b have experienced difficulties when dealing with your organisation

- c have made a specific request for information

- d need to be informed of circumstances of which they are unaware.

2 The style and tone of your communication must follow organisational guidelines and you must provide evidence that you have taken account of:

- a your job role and position in your organisation

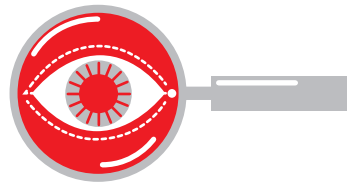
- b the personal style and preferences of your customer

- c the conventions of the medium of communication you are using.

3 You must show that you have communicated with customers when:

- a you have initiated the contact

- b you are responding to a customer.



Get it covered...

When you write to a customer, think about whether the content of the communication fits the style in which it is written. Answering a complaint, for instance, requires a different tone and style from promoting a new service.

What you must do

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

303.1 To use written or electronic communication effectively, you must:

303.1.1 operate equipment used to communicate in writing or electronically efficiently and effectively

303.1.2 ensure that the period of time between exchanges in writing or electronically represents excellent customer service

303.1.3 use language that is clear and concise

303.1.4 adapt your use of language to meet the individual needs of your customer

303.1.5 ensure that the style and tone of your written or electronic communication follows your organisation's guidelines and matches the service offer.

303.2 To plan and send an effective written or electronic communication, you must:

303.2.1 anticipate your customer's expectations taking account of any previous exchanges you may have had

303.2.2 assemble all the information you need to construct the communication

303.2.3 plan the objective of your communication

303.2.4 format your communication following your organisation's guidelines



What they say...

When the customer comes first,
the customer will last.

Robert Half, recruitment consultant

303.2.5 open the communication positively to establish a rapport with your customer

303.2.6 ensure that your customer is aware of the purpose of the communication as early as possible

303.2.7 summarise the key point of the communication and any actions that you or your customer will take as a result.

303.3 To handle incoming written or electronic communications effectively, you must:

303.3.1 read your customer's communication carefully to identify their precise reason for contacting you

303.3.2 identify what they are seeking as the outcome of the contact

303.3.3 identify all the options you have for responding to your customer and weigh up the benefits and drawbacks of each

303.3.4 choose the option that is most likely to lead to customer satisfaction within the service offer

303.3.5 summarise the outcome of the communication and any actions that you or your customer will take as a result.

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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.

303.4 To know how to deal with customers in writing or electronically, you must be able to:

303.4.1 explain the importance of using clear and concise language

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303.4.2 explain the additional significance and potential risks involved in committing a communication to a permanent record format

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303.4.3 describe the effects of style and tone on the reader of a written or electronic communication

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303.4.4 explain the importance of adapting your language to meet the needs of customers who may find the communication hard to understand

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303.4.5 describe your organisation's guidelines and procedures relating to written and electronic communication

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303.4.6 explain how to operate equipment used for producing and sending written or electronic communications

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303.4.7 explain the importance of keeping your customer informed if there is likely to be any delay in responding to a communication

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303.4.8 explain the risks associated with the confidentiality of written or electronic communications.

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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.

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| 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.

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| 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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