Unit 220	Support customers using self-service equipment

UAN:	H/506/2977
Level:	2
Credit value:	3
GLH:	18
Relationship to NOS:	This unit is linked to the Customers Service (2013) National Occupational Standards: • 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 using self-service equipment. Upon completion of this unit, learners will be able to identify the help needed by customers using self-service equipment and consequently provide help to customers using self-service equipment.

Learning outcome
The learner will:
1. understand how to support customers using self-service equipment
Assessment criteria
The learner can:
1.1 explain how the self-service equipment works
1.2 describe **problems** that are commonly encountered by customers when using self-service equipment
1.3 explain **demonstration techniques** to use when supporting customers using self-service equipment
1.4 explain **organisational procedures** for the use of equipment and fault reporting.

Assessment guidance

Problems can include**:**
    • no knowledge of what to do
    • rejection of details
    • lack of confidence often resulting in panic
    • machine refers the customer to ask for assistance

Demonstration techniques:
- showing the customer what to do
- allowing the customer to watch and then carry out the task
- allowing them to do it themselves and offer advice and guidance as needed

Organisational procedures will be centred on the use of the equipment backed by user manuals and instructions.

Evidence may be supplied by:
- professional discussion
- questioning
- reflective account
- organisational policies and procedures*

Learning outcome

The learner will:

2. be able to identify the help needed by customers using self-service equipment

Assessment criteria

The learner can:

2.1 identify **signs** that show when a customer is having difficulty with the self-service equipment

2.2 Identify a style and level of **intervention** that meets customers' needs.

Assessment guidance/evidence

Signs that show when a customer is having difficulty are when they:
- look around for someone to help
- ask for assistance
- are struggling to use it or have a problem
- look at it and obviously don't know where to start
- have experienced a problem and have signalled for help
- have details rejected.

Intervention:

Is when assistance is offered. It is approaching the customer in a non-threatening manner and to get them to accept assistance.

Evidence may be supplied by:
- observation
- witness testimony
- professional discussion
- questioning
- reflective account
- service offer*
- customer records*
- instruction manual*
- documentation*
- organisational policies and procedures*

Learning outcome
The learner will:
3.   be able to help customers to use self-service equipment

Assessment criteria
The learner can:
3.1   maintain a professional, polite and approachable manner while monitoring customers' use of equipment
3.2   use staff **override functions** to enable self-service equipment to be used by customers
3.3   explain to customers how to use the equipment and complete the transaction
3.4   report equipment-related errors and issues to the right person.

Assessment guidance
Override functions will vary according to the purpose of the equipment and the organisation.

Evidence may be supplied by:
- observation
- witness testimony
- professional discussion
- questioning
- reflective account
- service offer*
- customer records*
- instruction manual*
- documentation*
- problem logs
- organisational policies and procedures*

Note: this unit is about supporting customers using self-service equipment.

Here the candidate will require to be observed over time supporting customers using self-service equipment. 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. |