

UNIT 224 (LEVEL 2 UNIT, 5 CREDITS)

SUPPORT CUSTOMERS USING ONLINE CUSTOMER SERVICES

Elements in this unit

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

- 224.1** can establish the type and level of support your customer needs to achieve online customer service
 - 224.2** can support online customer service in conversation with your customer
 - 224.3** understand how to support customers using online services.

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'.

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.

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 supporting customers who are:

- a new to the use of online services for this particular purpose

- b familiar with the use of online services for this particular purpose.

2 Your evidence must include examples of helping customers with difficulties caused by:

- a the customer's use of the online services

- b a system or equipment failure.

What you must do

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

224.1 To establish the type and level of support your customer needs to achieve online customer service, you must:

224.1.1 ensure that you are up to date with the online services that your customers use

224.1.2 identify what the customer is trying to achieve and what they are having difficulties with

224.1.3 question your customer to discover the customer's degree of familiarity with the system

224.1.4 offer your customer the option of trying the online approach once more

224.1.5 agree with your customer the exact nature of the problem and steps that may be taken to overcome it.

224.2 To support online customer service in conversation with your customer, you must:

224.2.1 explore the online customer system in order to develop your own knowledge and skills in its use

224.2.2 step through the screen sequence with your customer whilst allowing them to operate the system for themselves

224.2.3 address your customer in an understanding and supportive manner

224.2.4 explain to your customer why certain steps are required in the process

224.2.5 offer the options to your customer of stepping them through the process or completing the transaction themselves

224.2.6 promote access to additional services or products when supporting customers online.

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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.

224.3 To understand how to support customers using online services, you must be able to:

224.3.1 explain how your organisation's system for online service delivery works

224.3.2 describe the importance of close active listening to discover what your customer is trying to achieve

224.3.3 identify ways to communicate clearly with customers who have different levels of skills and understanding of the online system

224.3.4 explain why it is generally preferable for your customer to complete a transaction for themselves

224.3.5 explain the importance of building customer confidence in using the online system by supporting and encouraging

224.3.6 compare the benefits and drawbacks of talking a customer through use of the system or completing the transaction themselves

224.3.7 identify additional services or products that may be promoted to online customers.

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

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

Signature of assessor | Date

Countersignature of assessor | Date

Signature of IV (if sampled) | Date

Countersignature of IV | Date

Signature of EV (if sampled) | Date