

SFJCCDB2.1

Determine customer needs and requirements over the telephone



Overview

This unit is about determining customer needs and requirements. It includes effective listening and appropriate questioning styles to obtain relevant information and understanding of customers' needs. The unit covers effective communication, providing appropriate advice and information to customers. It also includes carrying out working duties in line with security, data protection, health and safety regulations and current departmental and organisation policies and procedures at all times.

For the purpose of this standard, 'customers' can mean customers internal and external to the organisation or department.

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Performance criteria

You must be able to:

- P1 carry out your working duties in line with security, data protection, health and safety regulations and current departmental and organisational policies and procedures at all times
- P2 follow the greetings process to introduce yourself to customers
- P3 establish identity of customers, where required by organisational procedures
- P4 access relevant information sources to assist with dealing with customers' needs and requirements
- P5 use effective listening and appropriate questioning styles to obtain relevant information and understanding of customers' needs
- P6 communicate with customers in a sensitive and professional manner
- P7 communicate in ways that help customers to understand the information you are communicating and its relevance to them
- P8 use a variety of techniques, where required, to gain and maintain customers' attention and interest
- P9 adjust your communication in response to verbal feedback
- P10 where you have to use jargon, technical terms or abbreviations, check understanding when necessary
- P11 provide answers to customers' queries and check if their needs have been met
- P12 recognise when a request is beyond your remit or that of your organisation and inform the customer and transfer or signpost them to a more appropriate service, if known
- P13 record, store and share current, accurate and complete information, where required by organisational procedures
- P14 confirm agreed outcomes, responsibilities of all parties and timescales with customers

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Knowledge and understanding

You need to know and understand:

- K1 current, relevant departmental/organisational policies and procedures, for determining customer needs and requirements and the importance of following them
- K2 current, relevant health and safety regulations and departmental/organisational requirements and the importance of following them
- K3 current, relevant security regulations and departmental/organisational policies and procedures and the importance of following them
- K4 current, relevant data protection regulations and departmental/organisational policies and procedures and the importance of following them
- K5 your departmental/organisation greetings process to introduce yourself to customers
- K6 the importance of establishing identity of customers
- K7 different information sources and which sources are relevant to determining customer needs and requirements
- K8 how to navigate and access relevant information sources using appropriate systems
- K9 different questioning styles and the importance of effective listening to obtain relevant information and understanding of customers' needs
- K10 the importance of understanding customers' needs and requirements
- K11 the principles of effective communication and how to apply them
- K12 the importance of communicating to customers in a sensitive and professional manner
- K13 the importance of ensuring customers understand the information being communicated and its relevance to them
- K14 techniques for gaining and maintaining customers' attention and interest
- K15 the range of customers' needs and requirements and how these can be met
- K16 the meaning of jargon, technical terms and abbreviations relevant to your role and when it is suitable to use them
- K17 your professional limits and when a request is beyond your remit or that of your organisation and the importance of informing the customer
- K18 different services available to the customer and the importance of transferring or signposting the customer to the relevant service
- K19 the importance of recording, storing and sharing information that is current, accurate and complete
- K20 the parties involved in meeting customers' needs and requirements and what their responsibilities are
- K21 the importance of confirming agreed outcomes and timescales with customers

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Additional Information

Behaviours

1. You identify people's information needs
2. You listen actively, ask questions, clarify points and rephrase others' statements to check mutual understanding
3. You present information clearly, concisely, accurately and in ways that promote understanding
4. You check the validity and reliability of information
5. You keep people informed of plans and developments
6. You demonstrate a clear understanding of different customers and their real and perceived needs
7. You give people opportunities to provide feedback and you respond appropriately
8. You comply with legal requirements, industry regulations, organisational policies and professional codes
9. You act within the limits of your authority
10. You keep confidential information secure
11. You make appropriate information and knowledge available promptly to those who need it and have a right to it
12. You model behaviour that shows respect, helpfulness and cooperation

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