Deal with customer requirements using a range of contact methods

Overview

This standard 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 methods used to deal with customers can include telephone, social media, web chat, email, SMS or other communications tools used by the organisation.

The standard covers effective communication, providing appropriate advice and information to customers and completing any required after-contact activities. It also includes carrying out working duties in line with security, data protection, health and safety regulations and organisational policies and procedures at all times.

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

Performance criteria

You must be able to:

1 apply required security, data protection, health and safety regulations and organisational policies and procedures throughout own duties

2 follow organisational greetings process when dealing with customers

3 establish identity of customers in line with security regulations

4 access information sources to assist with dealing with customers' requirements in line with data protection regulation and organisational policies and procedures

5 ask questions to obtain information on customers' requirements in line with organisational policies and procedures

6 listen to gain an understanding of customers' requirements in line with organisational policies and procedures

7 communicate with customers using styles sensitive to individual needs in line with organisational policies and procedures

8 check customers' understanding of information given to them during the contact in line with organisational policies and procedures

9 use communication techniques to maintain customers' interest

10 check customers' requirements have been met during the contact in line with organisational policies and procedures

11 seek support when customers' requirements are beyond own remit in line with organisational policies and procedures

12 inform customers of the need to transfer the contact in line with organisational policies and procedures, including:

12.1 signposting customers to other services

13 store information regarding customers in line with organisational procedures and data protection regulations

14 share customer information in line with organisational procedures and data protection regulations

15 agree responsibilities of all parties with customers in line with organisational timescales

16 carry out after-contact activities as agreed with the customer in line with organisational timescales

17 record completion of after-contact activities in line with organisational policies and procedures

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Knowledge and understanding

You need to know and understand:

1 organisational policies and procedures for dealing with customers' needs and requirements

2 legislation and regulations for dealing with customers' needs and requirements, including:

2.1 health and safety regulations

2.2 security regulations

2.3 data protection regulations

3 the importance of applying procedures and regulations to own role

4 the organisational greetings process when initialising contact with customers

5 the importance of establishing the identity of customers

6 different information sources used to determine different customer requirements

7 how to access information sources using organisational systems

8 different questioning styles

9 the importance of effective listening to obtain understanding of customers' requirements

10 the importance of supporting vulnerable people access public services

11 the importance of understanding customers' requirements

12 principles of effective communication and how to apply them

13 the importance and styles of communicating with customers in ways sensitive to customers' needs

14 the importance of ensuring customers understand the information being communicated

15 techniques for maintaining customers' interest

16 range of customers' requirements and how these can be met

17 the meaning of jargon, technical terms and abbreviations relevant to own role and when it is suitable to use these

18 own professional remits and when requests are beyond this

19 the importance of informing customers when own remit is exceeded

20 different services available to customers

21 the importance of signposting customers to different services

22 when to transfer customers to different services

23 the importance of storing and sharing customer information

24 parties involved in meeting customers' requirements and what their responsibilities are

25 the importance of confirming agreed outcomes and timescales with customers

26 range of after-contact activities expected in own role and the importance of

completing these

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