Unit Title:	**Support customers using on-line customer services**
Unit number	D4
Level:	2
Credit value:	5
Guided learning hours:	33

Unit purpose and aim

Many organisations develop their customer service by directing customers towards on-line services. Customer service delivered on-line leaves a customer isolated and reliant on screen routes and instructions. A customer may seek help face to face or by telephone. That help will involve the learner in understanding what the customer is trying to achieve, how the system allows for that and what point they have reached in terms of finding the right route. Difficulties can arise if the system fails or if the learner's customer is unable to discover how it can deliver what they want. This unit is for the learner if one part of their job involves helping customers to find their way through on-line systems.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
The Learner will: 1 Establish the type and level of support their customer needs to achieve on-line customer service	**The Learner can:** 1.1 Ensure that they are up-to-date and with the on-line services that their customers use 1.2 Identify what the customer is trying to achieve and what they are having difficulties with 1.3 Question their customer to discover the customer's degree of familiarity with the system 1.4 Offer their customer the option of trying the on-line approach once more 1.5 Agree with their customer the exact nature of the problem and steps that may be taken to overcome it	Candidates must have an understanding of: • The on-line services used by their customers and the importance of keeping • up-to-date • How to identify the needs of the customer and any difficulties they are encountering • Questioning techniques to obtain information from the customer • How to support customers with their use of the on-line facility

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
2 Support on-line customer service in conversation with their customer	2.1 Explore the on-line customer system in order to develop their own knowledge and skills in its use 2.2 Step through the screen sequence with their customer whilst allowing them to operate the system for themselves 2.3 Address their customer in an understanding and supportive manner 2.4 Explain to their customer why certain steps are required in the process 2.5 Offer the options to their customer of stepping them through the process or completing the transaction themselves 2.6 Promote access to additional services or products when supporting customers on-line	Candidates must have an understanding of: • How to develop own knowledge and understanding of on-line system • How to support customers through the use of the • on-line system by guiding them through the process • How to explain the system to the customer • Additional services and/or access available to customers and how to promote them to the customer
3 Understand how to support customers using on-line services	3.1 Explain how their organisation's system for on-line service delivery works 3.2 Describe the importance of close active listening to discover what their customer is trying to achieve 3.3 Identify ways to communicate clearly with customers who have different levels of skills and understanding of the on-line system 3.4 Explain why it is generally preferable for their customer to complete a transaction for themselves 3.5 Explain the importance of building customer confidence in using the on-line system by supporting and encouraging	Candidates must have an understanding of: • How the on-line system works • How to actively listen to the customer and why this is important • How to communicate with a wide variety of customers with differing needs • How to be encouraging and supportive to the customer with their use of the on-line system and why this is important • The advantages and disadvantages of talking a customer through the on-line system • The advantages and disadvantages of completing the transaction themselves • The additional services/products which may be promoted to on-line customers

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	3.6 Compare the benefits and drawbacks of talking a customer through use of the system or completing the transaction themselves	
	3.7 Identify additional services or products that may be promoted to on-line customers	

Assessment

This qualification is internally assessed by centre staff and externally verified by OCR Assessors.

Evidence requirements

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 OCR Customer Service Centre Handbook which can be downloaded from the OCR website: www.ocr.org.uk).*

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. You must provide evidence of supporting customers who are:

   a new to the use of on-line services for this particular purpose
   b familiar with the use of on-line services for this particular purpose

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

   a the customer's use of the on-line services
   b a system or equipment failure

Guidance on assessment and evidence requirements

Please refer to the OCR Customer Service Centre Handbook available from the OCR website
www.ocr.org.uk

National Occupational Standards (NOS) mapping/signposting

This unit maps fully to competences outlined in the OCR Customer Service 2010 (Institute of Customer Service) suite of National Occupational Standards.

Additional information

For further information regarding administration for this qualification, please refer to the OCR document *'Admin Guide: Vocational Qualifications' (A850)* on the OCR website www.ocr.org.uk