OCR
Oxford Cambridge and RSA

Unit Title:	**Support customers using self-service technology**
Unit number	D7
Level:	2
Credit value:	5
Guided learning hours:	33

Unit purpose and aim

Many organisations develop their customer service by directing customers towards self-service equipment which is operated by the customer alone. Regular customers become familiar with how that equipment operates and some will feel uncomfortable about being offered further help. Others may be learning about the use of the equipment for the first time or may be experiencing particular problems. Sometimes equipment fails and authorised intervention will be needed to clear it. Whichever is the case, the learner must be able to recognise what help and intervention is needed and to provide that in a way that pleases their customer and builds their confidence in the use of the equipment. This unit is right for the learner if any part of their job involves helping and encouraging customers to operate self-service equipment in order to improve their customer experience.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
The Learner will: 1 Identify the type of help needed by a customer using self-service technology	**The Learner can:** 1.1 Prepare a standard demonstration of using the self-service equipment 1.2 Prepare to answer frequently asked questions about the operation of the self-service equipment 1.3 Identify signs of when a customer is having difficulty with the self service equipment 1.4 Choose an appropriate style and level of intervention to help a customer who is having trouble using the self-service equipment	Candidates must be able to: • Demonstrate the use of self-service equipment • Answer frequently asked questions about the equipment • Notice when a customer is having difficulties with the equipment and use and intervene as and when appropriate

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
2 Assist a customer using self-service technology	2.1 Maintain a professional, polite and approachable manner while they observe customers using self-help technology 2.2 Demonstrate use of the self-service equipment to a customer 2.3 Respond to a request for help from a customer using self-help equipment 2.4 Make use of staff override options to clear self-service equipment for use by customers 2.5 Talk a customer through use of the self-service equipment whilst allowing them to operate it 2.6 Invite a customer to repeat the operation of the self-service equipment if that helps them to learn 2.7 Make positive and encouraging comments to a customer who is learning to use the self-service equipment 2.8 Explain to their customer why certain actions and steps are needed to operate self service equipment 2.9 Troubleshoot problems with self-service equipment and report errors and issues to appropriate people	Candidates must be able to: • Remain professional when observing customers • Demonstrate the use of the equipment to a customer • Respond appropriately to a customer requiring assistance • Override the system when required • Provide oral guidance on the use of the equipment • Be supportive to customers using the equipment and/or requiring support • Troubleshoot problems with the equipment and escalate to appropriate personnel if required
3 Understand how to support customers using self-service technology	3.1 Explain why their organisation chooses to offer customers self-service equipment 3.2 Explain all aspects of normal operation of the customer self-service equipment 3.3 State frequently asked questions about operation of the self-service equipment and effective answers to those questions	Candidates must have an understanding of self-service equipment including: • Why it is provided • How it works and how to explain this to customers • Frequently asked questions and responses • How to provide an effective demonstration • Identifying when a customer requires support

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	3.4 Describe techniques for giving an effective demonstration of self-service equipment 3.5 Identify signals and signs that a customer needs help with self-service equipment 3.6 Describe organisational procedures for using staff intervention to clear self-service equipment 3.7 Explain the importance of building customer confidence in using self-service equipment 3.8 Describe organisational procedures for dealing with self-service equipment problems	• Organisational procedures for over-riding the system • How to build customer confidence • Organisational procedures for dealing with equipment problems.

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. The self-service technology used in your evidence may be any technology used outside the home to allow customers to interact with an organisation and help themselves. Examples include, but are not restricted to, scanning groceries, printing a boarding pass, printing photos, buying from an automated vending machine, and using an electronic kiosk to obtain information of conduct a transaction.

5. You must provide evidence of supporting customers who are:

   a new to the use of self-service equipment for this particular purpose
   b familiar with the use of self-service equipment for this particular purpose

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

a the customer's use of the technology
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 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