

<b>Unit Title:</b>	<b>Deal with customers using bespoke software</b>
Unit number	B7
Level:	2
Credit value:	5
Guided learning hours:	33

## Unit purpose and aim

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Customer service is often delivered using bespoke software when dealing with customers face-to-face, by telephone or on-line. For the process to be effective, the learner must be able to navigate the system quickly and directly following recommended routes and using all the functionality of the system. Customers are unaware of the details of the system they are using and they must be kept informed of the different steps the learner is taking. The use of the system must also ensure that the learner keeps appropriate records of the transaction so that it can proceed successfully through the next stages. Most of all, customer satisfaction must drive the interaction and it should not appear to be dominated by the demands of the software. This unit is for a learner who is responsible for delivering service to customers at the same time as operating bespoke service software.

<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	<b>Knowledge, understanding and skills</b>
<b>The Learner will:</b> 1 Prepare to deliver customer service using bespoke software	<b>The Learner can:</b> 1.1 Sign on and open access to appropriate functions in the IT system 1.2 Navigate the architecture and geography of the customer service site to ensure they can access all appropriate areas 1.3 Explore screen or menu routes that are most appropriate for the customer service they are seeking to deliver 1.4 Ensure that they are familiar with the software manual, help screens or help lines to know where to locate technical support when needed 1.5 Prepare their work area to deliver customer service using bespoke software	Candidates must have an understanding of: <ul style="list-style-type: none"><li>• How to use equipment and software</li><li>• The availability of facilities within the software to support their delivery of customer service</li></ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p>2 Deliver customer service using bespoke software</p>	<p>2.1 Identify their customer or the services or products they wish to access</p> <p>2.2 Follow organisational procedures to step through the system in a way that responds to their customer's needs</p> <p>2.3 Use search or other specialist functions within the software to respond to customer requests</p> <p>2.4 Enter new records using the bespoke software system</p> <p>2.5 Amend customer service records in the bespoke software system</p> <p>2.6 Communicate with their customers in terms they can understand relating to the software system</p> <p>2.7 Follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software</p> <p>2.8 Interpret error messages and act on them to support their customer service</p> <p>2.9 Refer their customer to a colleague following organisational procedures if they are unable to complete the transaction</p>	<p>Candidates must be able to:</p> <ul style="list-style-type: none"> <li>• Follow organisational procedures when using the system</li> <li>• Use a range of facilities to: <ul style="list-style-type: none"> <li>- Search for information</li> <li>- Enter and edit records</li> </ul> </li> <li>• Communicate effectively with customers</li> <li>• Use the system to assist in leading the conversation with the customer</li> <li>• Interpret and act on error messages</li> <li>• Limits of authority/ability and who to refer to</li> </ul>
<p>3 Understand how to deal with customers using bespoke software</p>	<p>3.1 Describe access and sign-on routines for the bespoke software system</p> <p>3.2 Describe the architecture and geography of the bespoke software system</p> <p>3.3 Identify different screen or menu routes that can be followed to meet customer requirements</p> <p>3.4 Identify sources of support and help for the bespoke software including manuals, help screens and help lines</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> <li>• Access and sign-on routines for the system (hardware and software) they use</li> <li>• How the system works including the screen/menu routes</li> <li>• Sources of support and help</li> <li>• The importance of preparing the work station prior to customer service delivery</li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	3.5 Explain the importance of preparing a work area before delivering customer service 3.6 Explain search or other enquiry facilities within the bespoke software system 3.7 State the importance of avoiding jargon and system terminology when communicating with customers 3.8 Describe ways to respond to error messages when using a bespoke software system 3.9 Identify referral points and sources of information when they are unable to meet customer needs using the bespoke software system	<ul style="list-style-type: none"> <li>• How to use the search/enquiry facilities</li> <li>• The importance of avoiding the use of jargon and system terminology when dealing with customers</li> <li>• How to deal with error messages</li> <li>• Limits of authority and ability and who to refer to</li> </ul>

## Assessment

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

## Evidence requirements

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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](http://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. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You must provide evidence of dealing with customers using bespoke software:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job
  - d when people, systems or resources have let you down.

## Guidance on assessment and evidence requirements

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Please refer to the OCR Customer Service Centre Handbook available from the OCR website [www.ocr.org.uk](http://www.ocr.org.uk)

## National Occupational Standards (NOS) mapping/signposting

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

## Additional information

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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](http://www.ocr.org.uk)