

Unit Title:	Take details of customer service problems
Unit number	C2
Level:	1
Credit value:	4
Guided learning hours:	27

Unit purpose and aim

However good the customer service of the learners' organisation is, some problems will occur. Learners may not have the authority or experience to deal with the problem by themselves so it is important to collect helpful information for those who will deal with it. The learner will need to be able to identify that there is a problem, discover detailed information about that problem and pass on the information so that the problem can be tackled. This unit is about how to collect information about a customer service problem, pass it to the right people in the organisation and keep the customer informed about what is being done.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
The Learner will: 1 Respond to customers who raise a problem	The Learner can: 1.1 Recognise when their customer is raising a problem 1.2 Respond to their customer calmly and helpfully 1.3 Take details that will identify their customer	Candidates must have an understanding of: <ul style="list-style-type: none"> • How to recognise a customer has problems by what they say or do • How to respond to the customer • The details required to identify the customer
2 Gather details from customers who raise a problem	2.1 Ask their customer questions to clarify what has or has not happened to cause a problem 2.2 Check their understanding of what their customer sees as the problem 2.3 Ask their customer questions to clarify the customer's expectations about the service or product that is now causing a problem 2.4 Note the details of what their customer tells them about the problem	Candidates must have an understanding of: <ul style="list-style-type: none"> • How to gather details of the customers and their problem(s) to include: <ul style="list-style-type: none"> - Questioning - Checking understanding of the problem - Confirming customer expectations - Recording details of the problem - Confirming the information provided by the customer

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	2.5 Confirm with their customer details of what the customer has told them about the problem	
3 Pass details of problems raised by customers to the colleague who can deal with them	3.1 Collect details of any reference codes or identifiers which their organisation uses to identify the customer transaction that is now causing a problem 3.2 Gather any other details that are relevant to resolving the problem from colleagues, customer service records or product specifications 3.3 Tell their customer what they will do with the details of the problem so that action is taken 3.4 Tell their customer what to expect without making customer service promises that may not be met 3.5 Pass the details to a colleague who is able to deal with the problem	Candidates must have an understanding of: <ul style="list-style-type: none"> • Organisational procedures for the recording and referencing of customer problems • Sources of information available • Process for informing customer of what will happen • What can be done to solve the customer's problem • Limits to authority and who to refer to
4 Know how to take details of customer service problems	4.1 Identify customer expectations of the organisation's services or products that may cause problems if they are not met 4.2 Describe how to respond to customers who raise problems in a way that the customers will find calm and helpful 4.3 Name reference codes or identifiers their organisation uses to identify customers 4.4 Identify questions that can be used to gather information that will be most helpful in resolving a problem 4.5 State details their organisation needs to resolve a problem	Candidates must have an understanding of: <ul style="list-style-type: none"> • How to identify customer expectations • How to respond to customers who have problems • The organisational reference codes/identifiers for categorising problems • Questions that can be used to gather information • Organisational requirements for obtaining information and its recording • Methods used by the organisation to identify customer transactions e.g. receipt, customer record, invoice • Organisational procedures for escalating problems and who to refer to

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	4.6 Describe details their organisation uses to identify specific customer transactions 4.7 Name the appropriate colleagues to whom details of problems should be passed 4.8 Identify their organisation's preferences for the way in which details of problems should be passed on	

Assessment

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

Evidence requirements

1. Wherever possible your evidence should be based on 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 based on a realistic working environment or a work placement is permissible. Simulation is also allowed for evidence within this Unit but ideally this should be based on either previous or existing experience from a work placement, a realistic working environment or real work. (*Guidelines for the assessment of Simulated Activities and 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 need to include evidence of taking details of customer service problems from customers who are:
 - a easy to deal with
 - b difficult to deal with.
5. You may include evidence that you have passed details to a colleague able to deal with the problem either verbally or in writing.

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.