

<b>Unit Title:</b>	<b>Use questioning techniques when delivering customer service</b>
Unit number	B6
Level:	2
Credit value:	4
Guided learning hours:	27

## Unit purpose and aim

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This unit is about how the learner uses questioning both in planned sequences and in spontaneous conversation to paint a picture of what their customer wants and how the learner's organisation can deliver it. This unit is for a learner who comes into contact with their customer face to face, by voice technology or on-line with immediate interaction. This unit is probably not for a learner who deals with customers remotely when it takes time to exchange questions and responses.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p><b>The Learner will:</b></p> <p>1 Establish rapport and identify customer concerns</p>	<p><b>The Learner can:</b></p> <p>1.1 Greet their customer sincerely and invite a full and open response</p> <p>1.2 Use planned or spontaneous lines to indicate to their customer that they empathise with their initial enquiry</p> <p>1.3 Invite more detailed explanation from their customer</p> <p>1.4 Listen closely to their customer's responses to strengthen their understanding of customer concerns</p> <p>1.5 Use both open and closed questions to make appropriate connection with their customer and open the door to more detailed investigation</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> <li>• How to establish a rapport with a customer</li> <li>• A range of communication techniques including:               <ul style="list-style-type: none"> <li>- Greeting</li> <li>- Questioning</li> <li>- Listening</li> <li>- How to identify a customer's feelings/mood</li> </ul> </li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	1.6 Identify and note their customer's feelings and mood in relation to the information they are seeking	
2 Seek detailed information from customers using questioning techniques	2.1 Follow a planned trail of questions to explore in detail customer concerns they have already identified 2.2 Hold a spontaneous conversation with their customer to explore in detail customer concerns they have already identified 2.3 Explain to their customer why they need the information they are asking for 2.4 Use probing and searching questions that draw on comments or words used by their customer 2.5 Thank their customer for the information in a way that encourages further open responses 2.6 Use pre-planned routing and trigger questions that lead their customer to respond in new areas 2.7 Follow organisational procedures to record customer responses to inform future actions	Candidates must have an understanding of: <ul style="list-style-type: none"> <li>• The use of a range of questioning techniques to explore customer requirements including:               <ul style="list-style-type: none"> <li>- Planned</li> <li>- Unplanned</li> <li>- Probing</li> <li>- Searching</li> <li>- Routing</li> <li>- Trigger</li> <li>- Open</li> </ul> </li> <li>• Organisational procedures used to record customer responses</li> </ul>
3 Understand how to use questioning techniques when delivering customer service	3.1 Explain why establishing rapport makes it easier to draw information from customers 3.2 Describe ways to greet customers that immediately build rapport 3.3 Explain reasons for using planned question patterns to draw out particular information 3.4 Explain reasons for using spontaneous conversation to draw out particular information 3.5 Explain the importance of active listening when seeking detailed information from customers	Candidates must have an understanding of: <ul style="list-style-type: none"> <li>• Why it is important to establish a rapport with customers</li> <li>• How to build a rapport with customers</li> <li>• Reasons for using the following techniques:               <ul style="list-style-type: none"> <li>- Planned questioning</li> <li>- Spontaneous conversation</li> <li>- Active listening</li> <li>- Open and closed questions</li> <li>- Explaining why information is needed to help the customer</li> </ul> </li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	3.6 Identify the differences between and uses of closed and open questions 3.7 Describe the importance of explaining to customers why information is needed 3.8 Explain why particular trigger questions are effective in gaining specific information	- Trigger questions

## 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. You must provide evidence of using questioning techniques when delivering customer service:
  - 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.
5. You need to include evidence of using questioning techniques with customers who are:
  - a easy to deal with
  - b difficult to deal with

## 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)