

Overview

This standard is part of the customer service competence area related to Customer Service Foundations. It covers managing communications in a customer service environment. It includes the language and concepts of customer service as well as the organisational context and the external environment in which you work. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

You communicate with customers and colleagues using language and concepts that they can understand. You provide customer service in your organisation and contribute to meeting your organisation's requirements. You can describe and explain the products or services that your organisation offers and how it delivers customer service. This means that you use the right language and understand why an organisation needs to balance customer needs with what the organisation is willing and able to provide. Everybody involved in customer service needs to know the customer service content of their job. To provide customer service you also need to understand what your customers want and how they feel. This means that you share information with them and listen carefully to them. Your customers need to understand what you are telling them and what you can do for them. Communication is an essential skill for delivering customer service. Your customer service role involves talking to customers face-to-face or by virtual means of communication. These may be by telephone, through social media platforms or web portals.

This standard is for customer service professionals who manage communications that are at the heart of their organisation's customer service, dealing with both customers and colleagues.

Performance criteria

You must be able to:

1. identify your organisation's customer profiles and their expectations
2. discuss and agree customer expectations with colleagues
3. use your organisation's systems, technologies, processes and procedures for communication with customers
4. access the information you need to deliver customer service within your organisation's guidelines and service level agreements (SLAs)
5. confirm your role and responsibilities for delivering customer service
6. summarise your organisation's service and product information for customers
7. identify the options available to respond to your customers and the benefits and drawbacks of each
8. liaise with customers in a respectful and professional manner face-to-face, on the telephone or through virtual means of communication
9. follow communication protocol in accordance with your organisation's guidelines
10. open conversation with customers to establish their rapport
11. confirm the identity of customers following organisational guidelines and relevant data protection legislation
12. respond to customer communications within your organisation's guidelines and time scales
13. use different types of questions to clarify your customers' needs or requirements
14. check that you understand customers' needs or requirements
15. communicate your actions when accessing information to provide customer responses
16. provide information to customers in response to their questions or requests
17. summarise the outcome of your contact with customers and any actions to be taken
18. check that customer needs have been met during contact and that all their questions or requests have been dealt with
19. update customer records during or after contact to reflect the key points of conversations
20. take messages for colleagues when you are unable to deal with customers questions or requests
21. maintain communication with colleagues to provide customer service

22. summarise customer information for colleagues when dealing with situations outside your level of authority
23. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Knowledge and understanding

You need to know and understand:

1. your organisation's customer profiles and their expectations
2. the differences between internal and external customers
3. why organisational procedures and teamwork are important for providing customer service
4. your organisation's systems, technologies and procedures for communication with customers
5. how to find information about your organisation's products and services to support customers' needs
6. the relationship between customer expectations and customer satisfaction and how to meet their needs
7. the products and services offered by your organisation and your role in delivering customer service related to these
8. the importance of customer service and the different roles and responsibilities for delivering customer service in your organisation
9. the communication protocol in accordance with your organisation's guidelines
10. how to open conversation with your customers to establish their rapport
11. how to establish the customer identity in accordance with organisational guidelines and relevant data protection legislation
12. the kinds of information you need to give for good customer service
13. the types of questions to clarify your customers' needs or requirements
14. how to check your understanding your customers' needs and requirements
15. how to use different types of questions to check your understanding about what customers are telling you
16. how to summarise information for customers
17. why it is important to use words your customers understand and the difference between negative and positive language
18. how to talk with customers face-to-face, on the telephone or through virtual means of communication
19. the outcome of your contact with customers and any actions to follow
20. how your communication style affects the way your customer experiences your customer service
21. how to update customer records during or after contact to reflect the key points of conversations

- 22. what information is helpful to pass on in messages to colleagues
- 23. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Developed by Skills CFA

Version Number 1

Date Approved 22 Feb 2021

Indicative Review Date 01 Mar 2026

Validity Current

Status Original

Originating Organisation Instructus

Original URN CFACSF1, CFACSA3

Relevant Occupations Customer Service Occupations

Suite Customer Service

Keywords customer service; language; communication; work with colleagues; follow procedures; give information; types of customer; company procedures; services and products; answer questions; internal customer; external customer; teamwork; problem solving;
