



# Record details of customer service problems

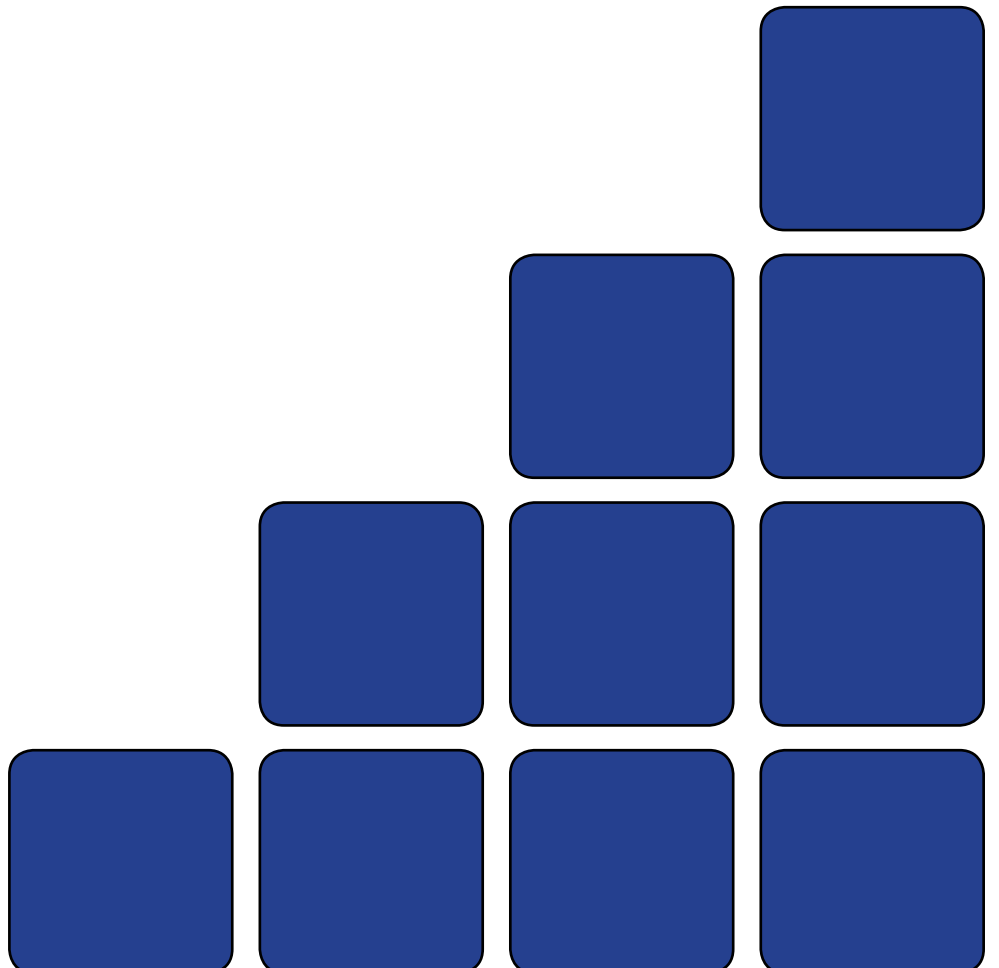
UBU6

A/506/2094

Learner name:

Learner number:

VRQ





# UBU6

## Record details of customer service problems

The aim of this unit is to develop the knowledge and understanding to be able to record customer service problems. You will learn how to identify the likely cause of the problem and be able to refer all the information to the appropriate people.

Level

**1**

Credit value

**3**

GLH

**14**

Observation(s)

**2**

External paper(s)

**0**



# Record details of customer service problems

## Learning outcomes

On completion of this unit you will:

1. Be able to gather and record details from customers who raise problems
2. Be able to refer details of customers' problems to colleagues
3. Know how to process details of customers' problems

## Evidence requirements

1. *Environment*  
Evidence for this unit may be gathered within the workplace or realistic working environment (RWE).
2. *Simulation*  
Simulation is allowed in this unit.
3. *Observation outcomes*  
Competent performance of Observation outcomes must be demonstrated on **at least two occasions**. Assessor observations, witness testimonies and products of work are likely to be the most appropriate sources of performance evidence. Professional discussion may be used as supplementary evidence for those criteria that do not naturally occur.

Assessed observations should not be carried out on the same day for the same learning outcome. There should be sufficient time between assessments for reflection and personal development.

You need to meet the same standard on a regular and consistent basis. Separating the assessments by a period of at least two weeks is recommended as competence must be demonstrated on a consistent and regular basis.

4. *Knowledge outcomes*  
There must be evidence that you possess all the knowledge and understanding listed in the Knowledge section of this unit. In most cases this can be done by professional discussion and/or oral questioning. Other methods, such as projects, assignments and/or reflective accounts may also be used.
5. *Tutor/Assessor guidance*  
Your tutor **must** refer to the '**Skills CFA Assessment Strategy**' when delivering this unit. This can be found on [www.vtct.org.uk](http://www.vtct.org.uk) under the relevant qualification page.  
  
You will be guided by your tutor/assessor on how to achieve learning outcomes in this unit. All outcomes must be achieved.  
  
For guidance on the assessment material for some individual units please refer to the '**Assessment Guidance**'. This can be found on [www.vtct.org.uk](http://www.vtct.org.uk) under the relevant qualification page.
6. *External paper*  
There is no external paper requirement for this unit.

# Achieving observations

## Achieving observation outcomes

Your assessor will observe your performance of practical tasks. The minimum number of competent observations required is indicated in the Evidence requirements section of this unit.

Criteria may not always naturally occur during a practical observation. In such instances you will be asked questions to demonstrate your competence in this area. Your assessor will document the criteria that have been achieved through professional discussion and/or oral questioning. This evidence will be recorded by your assessor in written form or by other appropriate means.

Your assessor will sign off a learning outcome when all criteria have been competently achieved.

## Relationship to National Occupational Standards

Customer Service (2013) National Occupational Standards:

- CFAACSC2 Take details of customer service problems



# Observations

## Learning outcome 1

### Be able to gather and record details from customers who raise problems

You can:

- a. Respond to customers calmly and professionally
- b. Take details that will identify individual customers
- c. Identify the nature and likely causes of problems
- d. Check own understanding of what customers see as a problem
- e. Record details of customers' problems
- f. Adhere to organisational policies and procedures, legal and ethical requirements when dealing with problems

\* *May be assessed by supplementary evidence.*

Observation	1	2	Optional
Date achieved			
Criteria questioned orally			
Portfolio reference			
Assessor initials			
Learner signature			



## Learning outcome 2

### Be able to refer details of customers' problems to colleagues

You can:

- a. Refer customers' problems to the appropriate people
- b. Explain to customers what is happening, without making promises

*\*May be assessed by supplementary evidence.*

Observation	1	2	<i>Optional</i>
Date achieved			
Criteria questioned orally			
Portfolio reference			
Assessor initials			
Learner signature			



## Achieving knowledge outcomes

You will be guided by your tutor and assessor on the evidence that needs to be produced. Your knowledge and understanding will be assessed using the assessment methods listed below\*:

- Projects
- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies
- Professional discussion

Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

When a criterion has been orally questioned and achieved, your assessor will record this evidence in written form or by other appropriate means. There is no need for you to produce additional evidence as this criterion has already been achieved.

Some knowledge and understanding outcomes may require you to show that you know and understand how to do something. If you have practical evidence from your own work that meets knowledge criteria, then there is no requirement for you to be questioned again on the same topic.

*\*This is not an exhaustive list.*

# Knowledge



## Learning outcome 3

### Know how to process details of customers' problems

You can:	Portfolio reference
a. Describe how to recognise when customers are raising problems	
b. State why reference codes are used to identify customers and specific transactions	
c. Describe different types of questions to ask when processing details of customers' problems	
d. Describe how to behave and communicate with customers who are dissatisfied	
e. Describe when, why and to whom to refer customers' problems	