OFFER CUSTOMER SERVICE

UNIT CODE: BUS/OS/BF/CR/06/6/B

UNIT DESCRIPTION

This unit specifies the competencies required to offer customer service. It involves handling customer enquiries, managing customer complaints, guiding customers on banking services and responding to internal queries.

ELEMENTS AND PERFORMANCE CRITERIA

ELEMENT **These describe the key outcomes which make up workplace function (to be stated in active)**	PERFORMANCE CRITERIA **These are assessable statements which specify the required level of performance for each of the elements (to be stated in passive voice)** *Bold and italicized terms are elaborated in the Range*
1. Handle customer enquiries	1.1 Customer details are obtained as per standard operating procedures 1.2 Customer concerns are recorded as per standard operating procedures 1.3 Understanding of customer queries is acknowledged as per standard operating procedures 1.4 **Customer queries** are responded to as per standard operating procedures
2. Manage customer complaints	2.1 Customer details are obtained as per standard operating procedures 2.2 Customer complaint are recorded as per standard operating procedures 2.3 Understanding of customer complaint is acknowledged as per standard operating procedures 2.4 Customer complaint are responded to as per standard operating procedures
3. Guide customers on banking services	3.1 Customer needs are understood as per work place procedures 3.2 Services offered at different work station is understood as per organizational structure 3.3 Bank products are identified as per organizational structure 3.4 Customers are served as per their need

4. Respond to internal queries	4.1 Internal queries are received as per standard operating procedures
	4.2 Internal queries are analyzed as per standard operating procedures
	4.3 Internal queries are acted upon as per standard operating procedures
	4.4 Mails are received and dispatched as per standard operating procedures

RANGE

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environments and situations that will affect performance.

VARIABLE	RANGE
1. Customer queries may include but are not limited to:	• account statement • balance • cheque book • debit card

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit of competency.

Required Skills
The individual needs to demonstrate the following skills:
- communication
- negotiation
- conflict resolution
- listening
- budgeting
- financial management
- problem-solving

Required Knowledge
The individual needs to demonstrate knowledge of:
- Conflict resolution and negotiation techniques
- Credit and debt recovery principles and techniques
- Financial delegations and limits applied within organization and specific to role

- Legislative, regulatory and industry code requirements
- Organizational credit management policies and procedures
- Stress management techniques.

EVIDENCE GUIDE

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

1.	Critical Aspects of Competency	Assessment requires evidence that the candidate: Demonstrated ability to: 1.1 Respond to customer queries 1.2 Respond to customer complaint 1.3 respond to internal queries
2.	Resource Implications	The following resources should be provided: 2.1 Access to relevant workplace where assessment can take place 2.2 Appropriately simulated environment where assessment can take place
3.	Methods of Assessment	Competency in this unit may be assessed through: 3.1 Written tests 3.2 Oral questioning 3.3 Third party reports 3.4 Case studies
4.	Context of Assessment	Competency may be assessed 4.1 Off the job 4.2 on the job 4.3 During industrial attachment
5.	Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.