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Deal with customers using bespoke software

What this unit is about

Customer service is often delivered using bespoke software when dealing with customers face-to-face, by telephone or on-line. For the process to be effective, you must be able to navigate the system quickly and directly following recommended routes and using all the functionality of the system. Customers are unaware of the details of the system you are using and they must also be kept informed of the different steps you are taking. Your use of the system must also ensure that you keep appropriate records of the transaction so that it can proceed successfully through the next stages. Most of all, customer satisfaction must drive the interaction and it should not appear to be dominated by the demands of the software. This unit is for you if you are responsible for delivering service to customers at the same time as operating bespoke service software.

When you deal with customers using bespoke software you must consistently:

1. Sign on and open access to appropriate functions in the IT system
2. Navigate the architecture and geography of the customer service site to ensure you can access all the appropriate areas
3. Explore screen or menu routes that are most appropriate for the customer service you are seeking to deliver.
4. Ensure that you are familiar with the software manual, help screen or help lines to know where to locate technical support when needed
5. Prepare your work area to deliver customer service using bespoke software
6. Identify your customer or the services or products they wish to access
7. Follow Organisational procedures to step through the system in a way that responds to your customer's needs
8. Use search or other specialist functions within the software to respond in a way that responds to your customer's needs
9. Enter new records using the bespoke software system
10. Amend customer service records in the bespoke software system
11. Communicate with your customers in terms they can understand relating to the software system
12. Follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software
13. Interpret error messages and act on them to support your customer service
14. Refer your customer to a colleague following organisational procedures if you are unable to complete the transaction

Knowledge and Understanding

To be competent at dealing with customers using bespoke software you must know and understand:

- K1. Access and sign-on routines for the bespoke software system
- K2. The architecture and geography of the bespoke software system
- K3. Different screen or menu routes that can be followed to meet customer requirements
- K4. Sources of support and help for the bespoke software including manuals help screens and help lines
- K5. The importance of preparing a work area before delivering customer service
- K6. Search or other enquiry facilities within the bespoke software system
- K7. The importance of avoiding jargon and system terminology when communicating with customers
- K8. Ways to respond to error messages when using a bespoke software system
- K9. Referral points and sources of information when you are unable to meet customer needs using the bespoke software system