

Process information about customers

What this unit is about

You and your organisation need information about your customers and their behaviour to answer customer questions and to respond to customer requests. Information about customers is also used by your organisation to develop its customer service. Some customer information is collected from your customers. Other customer information is collected through information systems and equipment that make records of service delivery. In either case you must collect information, retrieve it and supply it when needed. Good customer information provides a sound basis for all customer service transactions. The quality of the customer information depends heavily on the skills and attention to detail of the person dealing with the information

When you process information about customers you must consistently:

1. Collect and record new information about customers following your organisation's guidelines
2. Update existing information about customers
3. Record and store information about customers that is accurate, sufficient and relevant following organisational guidelines
4. Respond promptly to authorised requests for information about customers
5. Select and retrieve relevant information for customers or colleagues following your organisation's guidelines
6. Supply accurate and sufficient information about customers to meet your customers or colleagues' guidelines
7. Choose the most appropriate way to supply information to your customers or colleagues
8. Confirm that your customers or colleagues have received and understood the customer information

Knowledge and Understanding

To be competent at processing customer service information you need to know and understand:

- K1. Your organisation's procedures and guidelines for collecting, retrieving and supplying information about customers.
- K2. Types of personal information about customers that should and should not be kept on record.
- K3. How to collect information about customers efficiently and effectively.
- K4. How to operate the customer information storage system.
- K5. Why processing information about customers correctly makes an important contribution to effective customer service.

K6. The importance of attention to detail when processing information about customers.

K7. Legal and regulatory restrictions on the storage and use of customer data.