



**Pensions
Management
Institute**
Moving pensions forward

Registered Office:
Devonshire House
60 Goswell Road
London
EC1M 7AD
T: +44 (0) 20 7247 1452
W: www.pensions-pmi.org.uk

Use questioning techniques when delivering customer service

What this unit is about

This unit is about how you use questioning both in planning sequences and in spontaneous conversation to paint a picture of what your customer wants and how your organisation can deliver it. This unit is for you if you come into contact with your customer face to face, by voice or on-line with immediate interaction. This unit is probably not for you if you deal with customers remotely when it takes time to exchange questions and responses.

When you use questioning techniques when delivering customer service you must consistently:

1. Greet your customer sincerely and invite a full and open response
2. Use planned or spontaneous lines to indicate to your customer that you empathise with their initial enquiry
3. Invite more detailed explanation from your customer
4. Listen closely to your customer's responses to strengthen your understanding of their concerns
5. Use both open and closed questions to make appropriate connection with your customer and open the door to more detailed investigation
6. Identify and note your customer's feelings and mood in relation to the information you are seeking
7. Follow a planned trail to explore in detail customer concerns you have already identified
8. Hold spontaneous conversation with your customer to explore in detail customer concerns you have already identified
9. Explain to your customer why you need the information you are asking for
10. Use probing and searching questions that draw on comments or words used by your customer
11. Thank your customer for the information in a way that encourages further open responses
12. Use pre-planned routing and trigger questions that lead your customer to respond in new areas
13. Follow organisational procedures to record your customer responses to inform future actions

Knowledge and Understanding

To be competent at using questioning techniques when delivering customer service you know and understand:

- K1. Why establishing rapport makes it easier to draw information from customers

- K2. Ways to greet customers that immediately build rapport
- K3. Reasons for using planned question patterns to draw out particular information
- K4. Reasons for spontaneous conversation to draw out particular information
- K5. The importance of active listening when seeking detailed information from customers
- K6. The differences between and uses of closed and open questions
- K7. The importance of explaining to customers why information is needed
- K8. Why particular trigger questions are effective in gaining specific information