

Overview

This standard is part of the customer service competence area related to Customer Service Foundations. It covers providing customer support online. It includes the language and concepts of customer service as well as the organisational context and the external environment in which you work. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Many organisations develop their customer service by directing customers towards online services. Customer service delivered online sometimes leaves a customer isolated and reliant on screen routes and instructions. A customer may seek help face to face, telephone or by online means of communication. You understand what your customers are trying to achieve, how the system allows for that and what point they have reached in finding the right route, then help them meet their needs. Difficulties can arise if the online system fails or if the customers are unable to complete what they want. Organisations may also direct customers towards self-service portals which are operated by the customer. Regular customers become familiar with how technologies operate on these portals and may feel uncomfortable about being offered help. Others may be using the technologies for the first time or may be experiencing problems. Sometimes technologies fail and authorised intervention is required to clear it. You recognise the types of help and intervention that are required and provide them to meet customer needs and build their confidence in using the technologies.

This standard is for customer service professionals who provide customer support online.

Performance criteria

You must be able to:

1. keep up to date with the online services that your customers use
2. use active listening to establish what your customers are trying to achieve when using online services
3. identify what your customers are having difficulties with
4. question your customers to establish their familiarity with the online services
5. identify customer problems with online services and agree the steps to overcome them
6. instruct customers through online screen sequences, encouraging them to operate the system for themselves
7. support your customers by explaining why certain steps are required in the process
8. offer to take your customer through the process or complete the transaction yourself
9. promote additional services or products when supporting customers with online services
10. prepare to demonstrate using self-service technologies and answer frequently asked questions about it
11. observe customers using self-service technology in line with your organisation's requirements
12. demonstrate how to use self-service technologies
13. identify when customers are having difficulties with self-service technologies
14. respond to requests for help from customers using self-service technologies
15. access staff override options to clear self-service technologies for use by customers
16. instruct customers in using the self-service technologies whilst allowing them to operate it and practice steps
17. make positive and encouraging comments to customers when they are learning to use the self-service technologies
18. troubleshoot problems with self-service technologies, reporting errors and issues to colleagues and decision makers
19. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Knowledge and understanding

You need to know and understand:

1. how your organisation's system for online service delivery works and the importance of developing your knowledge and skills related to using it
2. the importance of using active listening to discover what your customer is trying to achieve
3. the ways to communicate with customers who have different levels of skills and understanding of the online system
4. the reasons for encouraging customers to complete transactions themselves
5. the importance of building customer confidence in using the online system by supporting them to learn
6. the benefits and drawbacks of talking customers through using the system compared to completing the transaction yourself
7. the additional services or products that may be promoted to online customers
8. the reasons why your organisation offers customers self-service technologies
9. the importance of observing customers using self-service technologies and how to do this
10. how to operate the self-service technologies from a customer and staff perspective
11. the frequently asked questions about using self-service technologies and the answers that should be provided
12. the techniques for demonstrating the self-service technologies to a customer
13. the signals and signs that indicate that a customer needs help with self-service technologies
14. the organisational procedures for using staff intervention to clear self-service technologies
15. the importance of building customer confidence in using self-service technologies
16. the organisational procedures for dealing with self-service technologies' problems
17. the colleagues who can help you with self-service technologies problems
18. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

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Provide customer support online

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