UBU11

Process information about customers

The aim of this unit is to develop your knowledge and understanding to process customer information. You will learn how to retrieve the correct information to provide to the customer and to check authority for third parties seeking information on customers. You will learn about the legal and regulatory requirements that affect the supplying of customer information.

Level

2

Credit value

3

GLH

14

Observation(s)

0

External paper(s)

0



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Learning outcomes

On completion of this unit you will:

1. Understand how to process customer information
2. Be able to process customer information

Evidence requirements

1. *Knowledge outcomes*
   There must be evidence that you possess all the knowledge and understanding listed in the Knowledge section of this unit. In most cases this can be done by professional discussion and/or oral questioning. Other methods, such as projects, assignments and/or reflective accounts may also be used.
2. *Tutor/Assessor guidance*
   You will be guided by your tutor/assessor on how to achieve learning outcomes in this unit. All outcomes must be achieved.

   For guidance on the assessment material for some individual units please refer to the '**Qualification Specification**'. This can be found on www.vtctskills.org.uk.
3. *External paper*
   There is no external paper requirement for this unit.

Developing knowledge

Achieving knowledge outcomes

You will be guided by your tutor and assessor on the evidence that needs to be produced. Your knowledge and understanding will be assessed using the assessment methods listed below*:

- Projects
- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies
- Professional discussion

Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

When a criterion has been orally questioned and achieved, your assessor will record this evidence in written form or by other appropriate means. There is no need for you to produce additional evidence as this criterion has already been achieved.

Some knowledge and understanding outcomes may require you to show that you know and understand how to do something. If you have practical evidence from your own work that meets knowledge criteria, then there is no requirement for you to be questioned again on the same topic.

Relationship to National Occupational Standards

Customer Service (2013) National Occupational Standards:

- CFACSA6 Process information about customers

**This is not an exhaustive list.*

Knowledge



Learning outcome 1

Understand how to process customer information

You can:	Portfolio reference
a. Describe the functions of customer information systems	
b. Explain the way in which legislation and regulatory requirements affect the processing of customer information	
c. Explain different responsibilities and levels of authority for processing customer service information	
d. Explain the reliability of sources of customer information	
e. Explain the validity of customer information	



Learning outcome 2

Be able to process customer information

You can:	Portfolio reference
a. Record information about customers in line with organisational standards and procedures	
b. Keep customer information up-to-date	
c. Respond to requests for customer information from authorised people in a timely manner	
d. Retrieve customer information that meets the requirements of the request	
e. Supply customer information in a format appropriate for the recipient	
f. Adhere to organisational policies and procedures, legal and ethical requirements when processing customer information	