

Competences for helping clients by email

You need to be able to:	Before doing this you need to :
1 Recognise the merit of an email service to clients	a) Be aware why some clients may chose to use an email service
2 Work within the agreed level of bureau service	b) Have a detailed understanding of the difference between gateway assessment and advice
3 Retrieve and reply to email enquiries	c) Have a detailed understanding of how to use the system for retrieving and tracking emails
4 Where possible, make a full assessment of the problem using information from the client and any assumptions you feel it is safe to make	d) Be aware of the need to identify: <ul style="list-style-type: none"> • possible emergency situations • possible underlying discrimination • possible research and campaigns issues
6 Decide on whether you are able to make an adequate assessment of the client's problem in order to respond	e) Have a detailed understanding when you are able to usefully respond to a partial assessment f) Have a detailed understanding of when it is appropriate to ask for more details from the client before responding
5 Decide whether a service can be given to the client	g) Know what enquiries are outside the agreed bureau service or catchment area
7 Where the enquiry is beyond your expertise, seek guidance from your supervisor	h) Know who and how to seek guidance from your supervisor
8 Select the type of response that best suits the enquiry within the gateway assessment or advice service being offered by the bureau	i) Be able to decide which is an appropriate response: <ul style="list-style-type: none"> • Provide information • Signpost to another agency • Invite the client to contact the bureau • Provide advice

9	Provide information from CAB sources	j)	<p>Know how to use your bureau's sources of information including:</p> <ul style="list-style-type: none"> • Adviceguide • AdviserNet • local information
10	Where appropriate, direct the client to approved external websites for additional information	k)	<p>Know how to identify websites that have been agreed to be reliable, readable and accurate</p>
		l)	<p>Know how to copy and import web page addresses (URLs)</p>
11	Where appropriate, signpost the client to another agency	m)	<p>Know how to find contact details of 'approved' agencies</p>
12	Where the client needs further information, advice or help with action, provide bureau contact information	n)	<p>Know access details for your own bureau</p>
		o)	<p>Know when it is appropriate to offer an appointment</p>
13	Write a response using an appropriate style, language and format	p)	<p>Have a detailed understanding of bureau guidelines for responses to email enquiries including:</p> <ul style="list-style-type: none"> • using conversational language • how and when to drop in 'standard phrases'
14	When the response is complete, check for tone, typos and clarity	q)	<p>Be able to proof read own text</p>
15	Record and process completed responses in accordance with bureau procedures	r)	<p>Have a detailed understanding of the procedures for recording and processing completed responses</p>
		s)	<p>Know how to 'flag' urgent or difficult enquiries</p>
		t)	<p>Know the system for checking email replies</p>