BTEC

BTEC Level 2 Technical Certificate in
CUSTOMER SERVICE OPERATIONS

SPECIFICATION

First teaching: September 2017 | First certification: Summer 2018
ISSUE 3

Pearson

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BTEC Level 2 Technical Certificate in Customer Service Operations

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Edexcel, BTEC and LCCI qualifications

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About Pearson

Pearson is the world's leading learning company, with 35,000 employees in more than 70 countries working to help people of all ages to make measurable progress in their lives through learning. We put the learner at the centre of everything we do, because wherever learning flourishes, so do people. Find out more about how we can help you and your learners at qualifications.pearson.com

This specification is Issue 3. Key changes are listed in the summary table on the page after next of the document. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: qualifications.pearson.com

Welcome

With a track record built over 30 years of learner success, BTEC qualifications are widely recognised and respected. They provide progression to the workplace, either directly or via study at higher levels. Proof comes from YouGov research, which shows that 62% of large companies have recruited employees with BTEC qualifications.

Why are BTECs so successful?

BTECs embody a fundamentally learner-centred approach to the curriculum, with a flexible, unit-based structure. In these new BTEC Level 2 Technicals, the focus is on the development of technical, practical and transferable work-related skills, and sector-specific knowledge. The development of these skills is key for learners to progress to work or to an Apprenticeship.

When creating the BTEC Level 2 Technicals, we worked with employers to ensure that the qualifications meet their needs. Employers are looking for recruits with the appropriate technical knowledge, and technical and transferable skills essential for employment.

The BTEC Level 2 Technicals meet these requirements through:

- a range of occupationally-related qualifications, each with a clear purpose, so that there is a qualification to suit each learner's plan for career progression
- up-to-date content that is closely aligned with employers' needs for a skilled future workforce
- assessments chosen to help learners progress to the next stage. This means that some assessments are set by the centre to meet local needs, while others are set and marked by Pearson. This ensures that there is a core of skills and understanding common to all learners. For example, an externally-set test can be used to check that learners are confident in using technical knowledge to carry out a certain job.

We provide a wealth of support, both resources and people, to ensure that learners and their tutors have the best possible experience during their course. See *Section 11 Resources and support* for details of the support we offer.

A word to learners...

BTEC Level 2 Technicals will demand a lot of practical work from you. You will need to:
- complete a range of units
- be organised
- take some assessments that Pearson will set and mark
- take other assessments that will demonstrate your technical and practical skills
- keep a portfolio of your assignments.

But you can feel proud to achieve a BTEC because, whatever your plans in life – whether you decide to go on to work or to an Apprenticeship – success in your BTEC Level 2 Technical qualification will help you to progress to the next stage in your life.

Good luck, and we hope you enjoy your course.

Collaborative development

Learners completing their BTEC Level 2 Technicals will be aiming to go on to employment or to an Apprenticeship. It was essential therefore that we developed these qualifications in close collaboration with experts from professional bodies and businesses, and with the providers who will be delivering the qualifications. We are grateful to all the further education lecturers, tutors, employers, professional body representatives and other individuals who have generously shared their time and expertise to help us develop these new qualifications.

Employers, professional bodies and further education providers that have worked with us include:

British Gas

BT Group

Chartered Institute of Personnel and Development (CIPD)

Chartered Institute of Procurement & Supply (CIPS)

C&T Restaurants Ltd (trading as McDonald's).

In addition, professional bodies and businesses have provided letters of support confirming that these qualifications meet their recruitment requirements. These letters can be viewed on our website.

Summary of Pearson BTEC Level 2 Technical Certificate in Adult Care specification Issue 3 changes

Summary of changes made between the previous issue and this current issue	Page number
The wording in *Section 8 Teacher/centre malpractice* has been updated to clarify suspension of certification in certain circumstances.	Pages 77, 78
The wording under *Section 10 Understanding the qualification grade* has been updated to clarify current practice in ensuring maintenance and consistency of qualification standards.	Page 82

Summary of Pearson BTEC Level 2 Technical Certificate in Customer Service Operations specification Issue 2 changes

Summary of changes made to Issue 2	Page number
Addition of guidance concerning legislation, policies, regulations and organisations outside of England	Page 4
Change to date of first assessment available for *Unit 1: The Customer Service Environment*	Pages 13 and 72
Removal of reference to the Data Protection Act 1998	Pages 19, 28 and 39

Contents

Pearson BTEC Level 2 Technicals

Introduction

BTEC Level 2 Technicals are intermediate qualifications for post-16 learners who want to specialise in a specific occupation, occupational area or technical role. They prepare learners for work or an Apprenticeship by giving them the opportunity to develop sector-specific knowledge, technical and practical skills, and to apply these skills in work-related environments. The qualifications also provide progression to Level 3 Tech Level qualifications.

Developed in close conjunction with leading employers, BTEC Level 2 Technicals develop transferable workplace skills, such as good communication and the ability to work in a team, which employers have identified as essential for gaining employment in the sector and for progression once the learner is working.

At the core of these qualifications is the concept of preparing young people for the working world. Through practical activities and occupationally-fit-for-purpose assessments, learners will gain the skills and behaviours needed for sustainable employment.

BTEC Level 2 Technicals are designed to be used flexibly, depending on their size and scope:

- as part of a full-time 16–19 study programme, alongside mathematics and English GCSEs and/or Functional Skills, work placement and enrichment activities
- as the technical qualification within an Apprenticeship or off-the-job training for those already in work
- as a roll-on, roll-off programme for those entering an Apprenticeship or employment.

Pearson has developed the BTEC Level 2 Technicals suite to meet the Department for Education (DfE) requirements for qualifications to be offered as Technical Certificates for 16–19 year olds.

This specification contains the information you need to deliver the Pearson BTEC Level 2 Technical Certificate in Customer Service Operations (QN 603/0759/6). The specification signposts you to additional handbooks and policies. It includes all the units for this qualification.

This qualification is a part of the Level 2 Technicals suite for the business sector.
Other BTEC Level 2 Technicals available for this sector include the:

- Pearson BTEC Level 2 Technical Certificate in Business Administration (603/0481/9)
- Pearson BTEC Level 2 Technical Certificate in Business Enterprise (603/0482/0)
- Pearson BTEC Level 2 Technical Certificate in Retail Operations (603/0478/9).

1 Pearson BTEC Level 2 Technical Certificate in Customer Service Operations

Purpose

Who is the qualification for?

This qualification is for learners who want to start a career in customer service. It is designed for post-16 learners and can be taken as part of a wider study programme. It is an ideal qualification for learners intending to progress directly to employment in a customer service role, or to a customer service apprenticeship.

What does the qualification cover?

This qualification has been developed in consultation with employers in the customer service sector to ensure it enables learners to develop the skills and behaviours that will give them the best opportunity to be successful when applying for work.

All the content of the qualification is mandatory and relates directly to the skills, knowledge and behaviours expected by employers in a customer service operations role. The areas covered include:

- the customer service environment
- delivering face-to-face customer service
- delivering digital customer service
- improving customer service.

It will also enhance their broader skills in literacy and numeracy, which will be invaluable in supporting progression in other areas. In addition, it will develop their transferable technical and practical skills in communication, decision making, thinking skills/adaptability, self-management and development, problem solving and managing information.

What could this qualification lead to?

Achieving this qualification will give learners an advantage when applying for a job in customer service. The types of role learners will be ready for include:

- customer service assistant
- call centre advisor
- sales assistant.

When studied as part of a full study programme, typically alongside maths and English, this qualification gives a sound basis to progress further in a customer service role to a :evel 3 qualification such as a Pearson BTEC Level 3 National Extended Diploma in Business.

What is customer service operations?

Careers in customer service operations offer a fantastic progression pathway to a number of roles in an organisation, and the skills developed are highly transferable across all industries.

The customer service sector continues to grow rapidly, employing approximately 2.5 million people in the UK across all industries. The roles in customer service operations are changing, as customers are more willing to challenge service, demand faster response times, make cross-sector comparisons about service standards and expect services tailored to their individual needs. Customer service is also moving towards being a service-led economy, where technology is used to spread the word about customer service delivery and to define expectations and customer loyalty.

Customer service roles can be varied across the sector, and employers are placing greater emphasis on the skills and behaviours of staff who are in direct contact with the customer, whether face to face or digitally.

2 Structure

Total Qualification Time (TQT)

For all regulated qualifications, Pearson specifies a total number of hours that it is estimated learners will require to complete and show achievement for the qualification: this is the Total Qualification Time (TQT). Within TQT, Pearson identifies the number of Guided Learning Hours (GLH) that we estimate a centre delivering the qualification might provide. Guided learning means activities such as lessons, tutorials, online instruction, supervised study and giving feedback on performance, that directly involve tutors and assessors in teaching, supervising and invigilating learners. Guided learning includes the time required for learners to complete external assessment under examination or supervised conditions.

In addition to guided learning, other required learning directed by tutors or assessors will include private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

The Pearson BTEC Level 2 Technical Certificate in Customer Service Operations is a qualification that has:

• Total Qualification Time: 360 hours
• Guided Learning: 240 hours.

Centres should take note of these hours in planning their programme but should also use their professional judgement to determine the provision of guided learning and study time across the units.

Qualification structure

Learners are required to complete and achieve all the units included in this qualification.

Pearson BTEC Level 2 Technical Certificate in Customer Service Operations				
Unit number	Unit title	GLH	Type	How assessed
1	The Customer Service Environment	60	Mandatory	External
2	Delivering Customer Service Face to Face	60	Mandatory	Internal
3	Delivering Digital Customer Service	60	Mandatory	Internal
4	Improving Customer Service	60	Mandatory	Internal Synoptic

This qualification has 100% mandatory content and 25% external assessment.

Qualification and unit content

Pearson has developed the content of this qualification in collaboration with employers and representatives from relevant professional bodies and further education providers. The content has been aligned to the National Occupational Standards and the Trailblazer Customer Service Practitioner Apprenticeship Standard. In this way, we have ensured that content is up to date and that it includes the knowledge, technical and practical skills and behaviours required to work in the sector and occupational area.

All units in this qualification are mandatory, which provides a balance of breadth and depth, ensuring that all learners develop the technical and practical skills required in the occupational area. Learners are then offered the opportunity to develop a range of transferable skills and attributes expected by employers. It is expected that learners will apply their learning to relevant employment and sector contexts during delivery and that they will have opportunities to engage meaningfully with employers.

BTECs have always required applied learning that brings together knowledge and understanding (the cognitive domain) with practical and technical skills (the psychomotor domain). This is achieved through learners performing practical, work-related tasks that encourage the development of appropriate work-related behaviours (the affective domain) and transferable skills. Transferable skills are those such as communication, teamwork and planning, and completing tasks to high standards, all of which are valued in the workplace.

Our approach provides rigour and balance and promotes the ability to apply learning immediately in new contexts.

Some of the units within the specification may contain references to legislation, policies, regulations and organisations, which may not be applicable in the country you deliver this qualification in (if teaching outside of England), or which may have gone out-of-date during the lifespan of the specification. In these instances, it is possible to substitute such references with ones that are current and applicable in the country you deliver subject to confirmation by your Standards Verifier.

Assessment

Assessment is designed to fit the purpose and objective of the qualification. It includes a range of assessment types and styles suited to skills and occupationally-based qualifications at this level.

External assessment

In this qualification, there is one external assessment, which assesses a unit that contributes 25% of the total qualification GLH. The external assessment for this qualification takes the form of an onscreen test that includes a variety of onscreen question types and allows learners to apply their knowledge to several work-related contexts. The external assessment is linked to a specific unit as indicated in the qualification structure on the previous page.

This method has been used to externally assess the identified unit because it is best suited to draw out the evidence to exemplify the expectations of the unit. The purpose of *Unit 1*: *The Customer Service Environment* is for learners to develop the fundamental knowledge and understanding of the role of a customer service assistant, the principles and practices related to the role, and the internal and external organisational context. The onscreen test allows learners to demonstrate the range of cognitive skills represented in the unit Assessment Outcomes to provide sufficient evidence that they have achieved the unit purpose. As the assessment is designed to measure the full range of thinking skills in the Assessment Outcomes, it will differentiate learners' performance across the full grade range.

The external assessment is taken under specified conditions, then marked by Pearson and a grade awarded. Learners must achieve the external unit at Pass grade or above to achieve the qualification. Learners are permitted to resit the external assessment once during their programme by taking a new assessment.

For further information on external assessment see *Section 7 External assessment.*

Internal assessment

Units 2, *3* and *4* are assessed through internal assessment. Internal assessment allows learners to apply technical knowledge and demonstrate mastery of practical and technical skills through realistic tasks and activities. This style of assessment promotes deep learning through ensuring the connection between knowledge and practice.

Internal assessment is through assignments that are subject to external standards verification. We provide suggestions in each unit for setting assignments. This means that you can adapt materials to your local contexts and assess assignments that provide the valid and rigorous final assessment for each unit.

You will make grading decisions based on the requirements and supporting guidance given in the units. Learners must achieve all the internal units at Pass grade or above to achieve the qualification. For further information on internal assessment, including resubmissions, see *Section 6 Internal assessment*.

Synoptic internal assessment

There is one internal unit that provides the main synoptic assessment for this qualification. This synoptic assessment is designed to take place towards the end of the programme and draws on the learning throughout. The design of this assessment ensures that there is sufficient stretch and challenge, enabling the assessment of sector-related knowledge and technical and practical skills at the end of the learning period.

The synoptic assessment for this qualification is based on *Unit 4* and takes the form of an investigative and practical task, where learners review how a specific organisation has collected and used customer feedback to make continuous improvements and then interpret customer feedback to make recommendations for improvements to customer service. In completing this synoptic assessment, learners will apply the underpinning knowledge and understanding developed in *Unit 1*, and will also select and apply the knowledge and skills developed across other units as appropriate.

In delivering the unit, you need to encourage learners to draw on their broader learning so that they are prepared for the assessment.

Language of assessment

Assessment of the internal and external units for this qualification will be available in English. All learner work must be in English. A learner taking the qualifications may be assessed in British sign language where it is permitted for the purpose of reasonable adjustment. For information on reasonable adjustments see *Section 8 Administrative arrangements*.

Grading of the qualification

Achievement in the qualification requires a demonstration of depth of study in each unit, assured acquisition of the practical skills required for employment in the specific sector and successful development of transferable skills.

Units are assessed using a grading scale of Distinction, Merit, Pass and Unclassified. All units in the qualification contribute proportionately to the overall qualification grade.

The qualification is graded using a scale of P to D. Please see *Section 10 Understanding the qualification grade* for more details.

The relationship between qualification grading scales and unit grades will be subject to regular review as part of Pearson's standards monitoring processes on the basis of learner performance and in consultation with key users of the qualification.

Employer involvement

Employer involvement in the delivery and/or assessment of technical qualifications provides a clear 'line of sight' to work, enriches learning, raises the credibility of the qualification in the eyes of employers, parents and learners, and furthers collaboration between the learning and skills sector and industry.

You need to ensure that all learners have the opportunity to undertake meaningful activity involving employers during their course.

Examples of 'meaningful activity' include:

- structured work experience or work placements that develop skills and knowledge relevant to the qualification/industry
- project(s), exercise(s) and/or assessments/examination(s) set with input from industry practitioner(s)
- units delivered or co-delivered by an industry practitioner(s); this could take the form of masterclasses or guest lectures
- industry practitioners operating as 'expert witnesses' who contribute to the assessment of a learner's work of practice, operating within a specified assessment framework; this may be a specific project(s), exercise(s) or all assessments for a qualification

Meaningful employer involvement, as defined above, should be with employers from the customer service sector and must contribute significantly to at least one mandatory unit.

For this qualification, the following units have specified requirements for employer involvement in delivery and assessment:

- Unit 2: Delivering Customer Service Face to Face
- Unit 3: Delivering Digital Customer Service
- Unit 4: Improving Customer Service.

These units must be completed with involvement of employers. It is strongly recommended that learners take part in work experience as the best way of enabling learners to complete these units and facilitate assessment. A simulation set in a realistic scenario may be used as an alternative to work experience, in which case centres must involve employers. Please see the units for further information.

Centres may choose to use other approaches but must ensure that they meet the requirement for meaningful employer involvement as defined above. Centres must have an employer involvement plan in place at the start of the programme. It must detail their approach to employer involvement and how it will add value to the delivery and assessment of the qualification.

Each centre's approach to employer involvement will be monitored in two ways. It will be monitored at centre level as part of the annual quality-management review process and captured as part of the standards verification process that addresses centre strategy for delivery, assessment and quality assurance, when we will ask you to show evidence of how employer involvement is provided for all learners. You will need to show evidence in order to gain reporting clearance for certification. It will also be monitored at programme level as part of the standards verification process to confirm that plans for employer involvement meet the requirements of the specification. These approaches are designed to ensure that additional activities can be scheduled where necessary so that learners are not disadvantaged, see *Section 9 Quality assurance*.

3 Units

Understanding your units

The units in this specification set out our expectations of assessment in a way that helps you to prepare your learners for assessment. The units help you to undertake assessment and quality assurance effectively.

Each unit in the specification is set out in a similar way. There are two types of unit format:

* internal units
* external units.

This section explains how the units work. It is important that all tutors, assessors, internal verifiers and other staff responsible for the programme read and are familiar with the information given in this section.

Internal units

Section	Explanation
Unit number	The number is in a sequence for the qualification.
Unit title	This is the formal title of the unit and appears on certificates.
Level	All units are at Level 2 on the national framework.
Unit type	This says if the unit is mandatory or optional for the qualification. See *Section 2 Qualification structure* for details.
Assessment type	This says how the unit is assessed – i.e. whether it is external, internal or synoptic internal. See *Section 2 Qualification structure* for details.
GLH	Units have a GLH value of 60 GLH. This indicates the numbers of hours of teaching, directed activity and assessment expected. It also shows the weighting of the unit in the final qualification grade.
Unit in brief	A brief formal statement on the content of the unit that is helpful in understanding its role in the qualification. You can use this in summary documents, brochures etc.
Unit introduction	This is designed with learners in mind. It indicates why the unit is important, how learning is structured and how learning might be applied when progressing to employment or higher education.
Learning aims	These help to define the scope, style and depth of learning of the unit. You can see where learners should be developing and demonstrating their skills or where they should be actively researching or reviewing.
Unit summary	This section helps tutors to see at a glance the main content areas against the learning aims and the structure of the assessment. The forms of evidence given are suitable to fulfil the requirements.
Content	This section sets out the required teaching content of the unit. Content is compulsory except when shown as 'e.g.'. Learners should be asked to complete summative assessment only after the teaching content for the unit or learning aim(s) has been covered.

Section	Explanation
Assessment criteria	Each learning aim has assessment criteria to explain the achievement required to obtain Pass, Merit and Distinction grades.
Essential information for assessment decisions	This information gives guidance for each learning aim or assignment of the expectations for Pass, Merit and Distinction standard. This section contains examples and essential clarification. It is important that this is used carefully alongside the assessment criteria.
Assessment activity	This section provides information, suggested scenarios and tasks for summative assessment activities.
Further information for tutors and assessors	The section gives you information to support the delivery and assessment of the unit.
Delivery guidance	This section offers suggestions of ways of delivering the unit. It offers ideas on practical activities in a sector context that can be used to help develop relevant skills and to encourage progress.
Essential resources	Any specific resources that you need to be able to teach and assess are listed in this section. For information on support resources see *Section 11 Resources and support*.
Links to other units	This section shows you the main relationships of units to other units. This can help you to structure your programme and make the best use of available materials and resources.
Employer involvement	This section gives you information on the units that can be used to give learners involvement with employers. It will help you to identify the kind of involvement that is likely to be successful.

External units

Section	Explanation
Unit number	The number is in a sequence for the qualification.
Unit title	This is the formal title of the unit and appears on certificates.
Level	All units are at Level 2 on the national framework.
Unit type	This says if the unit is mandatory or optional for the qualification. See *Section 2 Qualification structure* for details.
Assessment type	This says how the unit is assessed – i.e. whether it is external, internal or synoptic internal. See *Section 2 Qualification structure* for details.
GLH	Units have a GLH value of 60 GLH. This indicates the numbers of hours of teaching, directed activity and assessment expected. It also shows the weighting of the unit in the final qualification grade.
Unit in brief	A brief formal statement on the content of the unit.
Unit introduction	This is designed with learners in mind. It indicates why the unit is important, how learning is structured and how learning might be applied when progressing to employment or higher education.
Summary of assessment	This sets out the type of external assessment used and the way in which it is used to assess achievement.
Assessment outcomes	These show the hierarchy of knowledge, understanding, skills and behaviours assessed. For tested units, they include information on how this hierarchy relates to command terms in sample assessment materials (SAMs).
Essential content	For external units all the content is obligatory, the depth of content is indicated in the assessment outcomes and sample assessment materials (SAMs). The content will be sampled through the external assessment over time, using the variety of questions or tasks shown.
Grade descriptors	We use grade descriptors when making judgements on grade boundaries. You can use them to understand what we expect to see from learners at particular grades.
Key terms typically used in assessment	These definitions will help you to analyse requirements and to prepare learners for assessment.
Links to other units	This section shows the main relationships of units to other units. This section can help you to structure your programme and make the best use of available materials and resources.
Employer involvement	This section gives you information on the units that can be used to give learners involvement with employers. It will help you to identify the kind of involvement that is likely to be successful.

Units

This section contains all the units developed for this qualification.

Unit 1: The Customer Service Environment

Level: **2**

Unit type: **Mandatory**

Assessment type: **External**

Guided learning hours: **60**

Unit in brief

Learners examine the environment where effective customer service is provided and the importance of it to the success of a business.

Unit introduction

Working in customer service, you may be the first person customers talk to, and how you deal with these customers, their needs and problems, is key to business success.

In this unit, you will gain an understanding of the principles required to deliver effective customer service. You will discover the different types of internal and external customer and their specific needs and expectations. You will learn about what businesses do to ensure customer service is always delivered to a high standard and what can go wrong if procedures and processes fail. The unit also looks at how external factors such as legislation can affect the service offered.

This unit will provide you with the necessary knowledge and understanding to support the skills required by customer service practitioner roles.

Summary of assessment

This unit is assessed using an onscreen test, set and marked by Pearson. The test contains different types of question and is worth 60 marks. The test duration is 75 minutes. The assessment is available on demand. The first assessment is available in March 2018.

Sample assessment materials will be available to help centres prepare learners for assessment.

Assessment outcomes

AO1 Demonstrate knowledge and understanding of key customer service terms, definitions and principles

Command words: complete, explain, give, identify, match, name, outline, state

Marks: ranges from 1 to 2 marks

AO2 Demonstrate understanding and application of customer service principles and concepts to business organisations, their success, and the environment in which they operate

Command words: complete, explain, identify, outline

Marks: ranges from 1 to 4 marks

AO3 Be able to assess or analyse customer service information, demonstrating the ability to make connections, identify and compare information, predict consequences and provide reasonable alternatives

Command words: analyse, assess, discuss, explain

Marks: ranges from 2 to 6 marks

AO4 Be able to evaluate or assess customer service information to make informed judgements, including synthesising ideas and evidence from several sources to support arguments and form conclusions

Command words: assess, discuss, evaluate, explain

Marks: ranges from 2 to 6 marks

Essential content

The essential content is set out under content areas. Learners must cover all specified content before the assessment.

A   The business environment in which customer service operates

Understanding of basic business terminology and that customer service is provided in a wide range of business organisations. Assessment of the impact that choice of ownership and liability have on business and that organisational structure has on customer service operations.

A1 Features of businesses

Knowledge, understanding, application and assessment of the following features.

- Ownership and liability:
  - o private: sole trader, partnership, private limited company (ltd), public limited company (plc), cooperative, limited and unlimited liability
  - o public: government departments, local authorities
  - o not-for-profit: charitable trusts, voluntary sector businesses.
- Purposes, supply of products or services, difference between for profit and not-for-profit businesses.
- Scope of business activities: local, national, international, multinational.
- Size: micro – up to 9 staff; SMEs (small to medium-sized enterprises): small – between 10 and 49 staff, medium – between 50 and 249 staff; large – more than 250 staff.
- Reasons for success: strong customer service, vision, innovative products or processes.

A2 Structure and organisation

Knowledge, understanding and application of:

- organisational structure: hierarchical, flat, matrix – impact on customer service
- functional/operational areas: human resources, research and development, sales, marketing, purchasing, production and quality, finance, customer service, IT, administration, security, logistics, distribution
- relationship and communication between these areas
- lines of responsibility and levels of authority in the service chain.

A3 Aims of businesses

Knowledge, understanding and application of:

- long-term goals of the business:
  - o mission statement: will include the vision and values relating to customer service
  - o private sector: making profits, break-even, survival, growth, market share
  - o public sector: social wellbeing, security, value for money
  - o not-for-profit: helping the vulnerable, supporting communities both in this country and abroad.

B Customer service

Understanding and application of the customer journey (pre-service, service and post-service situations) across all organisations and the variety of customer service roles.

B1 Meaning, purpose and scope of customer service

Knowledge, understanding, application and assessment of:

- customers:
  - internal – working in business (managers, employees, owners, team leaders, supervisors, department heads, colleagues)
  - external – outside business (customers obtaining products and/or services)
- meaning of customer service: what an organisation does to meet and exceed internal and external customer needs and expectations
- purpose: customer satisfaction, positive reputation/image for organisation, customer loyalty, meeting/exceeding sales and service targets
- scope: what customer service involves, its value to the organisation:
  - pricing and range of products and/or services unique to an organisation
  - value added benefits, loyalty schemes
  - service-level agreements (SLAs)
- the customer journey – what the customer journey involves and its use to the organisation:
  - pre-service: enquiry stage
  - service/purchase stage
  - post-service stage – follow-up, or complaints
- value to an organisation of the customer journey:
  - the customers' responses, what they do, how they think and feel
  - the points of interaction with the customer on that journey and how they are made
  - the points in the customer journey that have most impact on the customer experience, how to reduce a negative experience
- value to an organisation of good customer service:
  - attracts new customers
  - secures customer loyalty
  - sets the standard of excellent customer service which competitors will need to match
- ways to meet or exceed customer expectations:
  - providing value for money, information and advice in a timely manner
  - providing additional help and assistance to deal with problems and queries
  - offering discounts, offering additional products or services, providing information on returns policy
  - providing exceptional help and assistance for customers with special requirements
  - flexible service and innovative ideas to differentiate from competitors
  - having an effective follow-up service.

B2 Customer service roles

Knowledge, understanding and application of different direct and indirect customer service roles in businesses.

The person seen by the customer as providing customer service and representing the business – a service deliverer:

- direct customer service: dealing directly with customers (receptionists, sales assistants, delivery drivers, customer service advisors, customer service call handlers):
  - face-to-face customer service (in hotels, restaurants, leisure centres, hospitals, shops)
  - remote customer service (in call centres, online)

- indirect customer service – (cleaners, maintenance staff, engineers)
- customer service teamwork in the service chain – cooperation between individuals and departments in the business, co-operation between manufacturers, suppliers, external organisations and the organisation which is providing the customer with products or services.

B3 Customer service behaviours, attributes and skills

Understanding and application of the importance of appropriate behaviours, attributes and skills for customer service practitioners, in meeting customers' expectations.

Behaviours:

- staff attitude (courteous, professional, respectful, knowledgeable, body language, tone of voice, appearance)
- resolve or refer complaints and problems as promised:
  - o follow up queries
  - o meet SLAs
  - o follow organisational procedures and policies – returns policy, complaints procedure.

Attributes and skills:

- putting customers at ease and gaining trust:
  - o building rapport (being friendly, listening, asking questions, using appropriate body language, showing empathy)
  - o using diplomacy, patience, tact and initiative
  - o listening and responding to customer problems or requests
  - o remaining impartial
  - o being open to suggestions
  - o active listening
  - o avoiding misleading comments or making promises that cannot be met.
- communication:
  - o verbal: appropriate language, reduced use of jargon, pitch and clarity, active listening
  - o written: style, format, language used
  - o non-verbal: body language, eye contact, listening skills.

B4 Provision of effective customer service

Understanding and application of actions or standards in customer service that will enable customer expectations to be met or exceeded:

- staff performance: following agreed standards when serving customers, being polite, efficient, knowledgeable, helpful, approachable, well trained
- staff presentation: professional and appropriate personal presentation (personal hygiene, uniform, dress, hair, make-up, jewellery), body language
- availability of help desk if appropriate
- effective monitoring of customer service, range of methods used and dealing with complaints quickly, enable changes to be made to the service offer to meet customer expectations
- following legal and regulatory requirements and having ethical standards
- ensuring that correct procedures are followed and customer service practitioners know extent of own authority and when to refer to appropriate manager
- minimising hazards and risks in buildings and informing people of dangers, wet floors, fire regulations, security alerts (health and safety)
- keeping up to date with knowledge of competitors' activities: using competitors' services; independent research (media, trade magazines); customer surveys.

B5 Importance of effective customer service

Understanding and application of the importance and outcomes of effective customer service:

* reputation and image (quality products, value for money, consistent, reliable, dependable and competitive, trustworthy service)
* impact on sales, profit, retention of existing customers, attraction of new customers, increases customer loyalty
* word-of-mouth recommendation, positive social media posts, competitive advantage, staff job satisfaction
* reduces complaints.

B6 Importance of effective follow-up or after-sales service

Understanding and application of the features and benefits of an effective follow-up or after-sales service:

* fast response times to complaints and queries, availability of designated help desk/helpline
* proactively updating customers on new products and/or services linked to initial purchase
* contacting customers following initial service delivery to confirm customer satisfaction
* offering incentives to secure customer loyalty
* monitoring and measuring customer satisfaction.

C   How the delivery of customer service is affected by legislation, regulation, ethical and environmental considerations

Knowledge, understanding and application of legal responsibilities in the role of a customer service practitioner, and their impact on the organisation and the customer service practitioner.

C1 Consumer rights

Knowledge and understanding of the key requirements of consumer legislation for customer service practitioners:

* Consumer Rights Act 2015: the rights of customers for goods and digital content to be of satisfactory quality, fit for a particular purpose, match the description; customer has the short-term right to reject, request repair, or replacement of faulty goods within 30 days of supply; the trader must provide repair or replacement at no cost to the customer, within a reasonable time, without causing significant inconvenience; where repair or replacement fail, entitlement to further repairs or replacements or claim a price reduction or the right to reject; after 6 months the customer has to prove defect/fault present at time of purchase; service must be carried out with reasonable care and skill; information said or written to the customer is binding where the customer relies on it; must be done for a reasonable price; must be carried out within a reasonable time
* Consumer Contracts Regulations 2014: the customers' rights when goods or services are bought online, over the telephone or from a catalogue; location of retailer and purchaser; delivery deadlines must be kept; the right to a cooling-off period; rights to cancellation; confirmation of purchase; rights to a refund
* Consumer Credit Act (1974 as amended 2006): credit agreements are required to provide certain pre-contract information; also in content of contract particularly interest rates (APR); cooling off/cancellation periods; personal credit information and file, access to and retention of; rules for credit agreements at a distance; application of rules to credit and store cards
* impact of non-compliance with the legislation or regulations on the business, customer service practitioner and effect on customer service, the business' finances and reputation.

C2 Health and safety legislation

Knowledge and understanding of the key requirements for customer service practitioners of:

- Health and Safety at Work etc. Act 1974
- effect of legislation on delivery of customer service:
  - establishes customer's legal and statutory rights and safeguards them
  - establishes organisation's legal and statutory responsibilities
  - products and/or services must meet regulations and legislation
  - staff need to follow clear procedures to remain compliant
  - organisations must have clear procedures in place and staff should be trained in these procedures
  - actions required to help ensure safety of self, colleagues and customers.
- impact of non-compliance with legislation or regulations on the business, effect on customer service and reputation.

C3 Ethical and environmental considerations that affect customer service

Knowledge, understanding, application and assessment of:

- ethical considerations: fairness (price, treatment of customers, service levels); respecting equality and diversity; following approved codes of practice; links to charitable organisations and fair trade partnerships; using local produce and suppliers
- environmental considerations: carbon emissions, waste, recycling, pollution, size of environmental footprint
- effects on customer service: procedures for providing customer service must demonstrate an understanding/appreciation of ethical considerations; policies and procedures may need to be changed if an organisation is not compliant; staff should be trained to improve their understanding and to improve practice; special considerations may be necessary to meet agreed standards.

C4 Equality legislation affecting customer service

Knowledge and understanding of the business' legal responsibilities when providing goods, facilities or services.

- Equality Act 2010: legally protects people from discrimination (on the grounds of age, disability, race, religion, sex, sexual orientation, being pregnant or having a child, gender reassignment, marriage and civil partnership)
- Working Time Regulations 1998: maximum weekly working time limit, time off, rest break entitlement, paid annual leave entitlement
- Employment Rights Act 1996: right to statements of employment particulars; right to itemised pay statement; protection of wages (no unauthorised deductions); right to time off for antenatal care; right to maternity and paternity leave; right not to be unfairly dismissed
- effects on customer service: special considerations and reasonable adjustments (improved access arrangements, audio induction loops, literature provided in large type or Braille, interpreters, translators, being patient, offering additional support); the service provided to customers must be fair and equal (staff training and education, monitoring to ensure practices meet legal requirements).

C5 Legislation affecting the use and storage of customer information

Knowledge, understanding and application of the principles of security and confidentiality of customers' information.

- principles of the data protection legislation:
  - information obtained and processed fairly and lawfully
  - obtained only for specific purposes

o adequate, relevant and not excessive

o accurate and up to date

o held no longer than is necessary for the registered purpose

o must be processed in accordance with the rights of the individual, and the individual has the right to see the information held on them

o surrounded by proper security

o cannot be transferred to countries outside the EU unless individual gives consent.

D Customer service and the customer complaints process

Understanding that complaints arise and of the barriers that can contribute to them. Understanding and application of how complaints are made and how to deal with them.

D1 Barriers to providing effective customer service

Knowledge, understanding, application and assessment of barriers:

- unmanageable and restrictive organisational policies and procedures

- inadequate customer service systems or procedures to support effective customer service

- staff problems (unclear lines of responsibilities and levels of authority, staff shortages, competence levels and knowledge, lack of incentives, use of jargon and/or abbreviations)

- lack of customer service training

- poor communication (colleagues, customers).

D2 Types of complaint

Knowledge, understanding and application of types of complaint. Issues with:

- staff: lack of knowledge, poor service delivery, poor attitude, poor behaviour

- products/services: quality, delivery problems, damage, price

- the organisation: procedures, policies, effect on community and environment, use of fair trade/child labour.

D3 Best practice for dealing with complaints

Knowledge, understanding, application and assessment of features of best practice for dealing with different types of complaint:

- features:
  - o customer complaints handled consistently across organisation, complaint procedure in place
  - o organisational processes are standardised, available to staff and customers
  - o set procedures are agreed with the customer and organisation: timescales for resolution, who will be involved, external agencies for resolution (Citizens Advice, Ombudsmen, Financial Conduct Authority)
  - o lines of responsibility and accountability are clearly set out and understood by well-trained and informed staff
  - o compliance with consumer legislation and respecting customers' statutory rights.

D4 Reasons to use a customer complaints and feedback process

Knowledge and understanding of reasons to use complaints process:

- customers will feel reassured and confident (dealing with organisation, obtaining products, using services, recommending to friends and family)

- organisational benefits (identifies areas of weakness, drives change to improve service, limits further damage to organisation's reputation).

Grade descriptors

To achieve a grade learners are expected to demonstrate these attributes across the essential content of the unit. The principle of best fit will apply in awarding grades.

Level 2 Pass

Learners are able to demonstrate knowledge that underpins the key tasks and role of a customer service practitioner, applying it to the context and the delivery of customer service. They have a sound understanding of procedures, considerations, responsibilities and implications associated with the principles, and are able to apply this to familiar situations/contexts. They are able to recall, interpret and apply information about the importance of the role, responsibilities and procedures.

Level 2 Distinction

Learners demonstrate thorough knowledge and understanding of the key responsibilities of the role of a customer service practitioner, applying this to a range of familiar and unfamiliar situations. Learners are able to assess the application of these principles and relate them to the role of a customer service practitioner, and the customer service skills required to support the business.

Learners will be able to interpret information about the importance of the role, responsibilities and procedures, and make reasoned judgements in a range of different contexts, demonstrating understanding of the interrelationships between the role, responsibilities and procedures and the requirements for providing excellent customer service and demonstrating the range of necessary skills.

Key words typically used in assessment

The following table shows the key words that will be used consistently by Pearson in our assessments to ensure learners are rewarded for demonstrating the necessary skills.

Please note: the list below will not necessarily be used in every paper/session and is provided for guidance only.

Command or term	Definition
Analyse	Learners examine in detail the meaning or essential features of a topic or situation, or break something down methodically into its components to say how they are related and explain how each one contributes to the topic or situation.
Assess	Learners present a careful consideration of a variety of factors that apply to a specific situation, or identify those which are the most important or relevant in order to arrive at a conclusion.
Complete	Learners will provide the item(s) necessary to make a list or order full or entire.
Discuss	Learners consider different aspects of a topic, how they interrelate and the extent to which they are important.
Evaluate	Learners draw on varied information to consider aspects such as strengths or weaknesses, advantages or disadvantages, alternative actions and relevance or significance, and come to a conclusion.
Explain	Learners show they understand the origins, functions and objectives of a subject and its suitability for purpose. They give reasons to support an opinion, view or argument, with clear details.
Give	Learners provide examples, justifications and/or reasons to a context.
Identify	Learners indicate the main features or purpose of something, and/or discern and understand facts or qualities.
Match	Learners choose a thing that resembles or corresponds to another, to make a similar or complementary pair.
Name	Learners give a term by which the object of the question is identified.
Outline	Learners provide a general description showing the essential features of something but not the detail.
State	Learners give a definition or example.

Links to other units

This unit assesses the underpinning knowledge in:

- Unit 2: Delivering Customer Service Face to Face
- Unit 3: Delivering Digital Customer Service
- Unit 4: Improving Customer Service.

Employer involvement

Centres may involve employers in the delivery of this unit if there are local opportunities. There is no specific guidance related to this unit.

Unit 2: Delivering Customer Service Face to Face

Level: **2**

Unit type: **Mandatory**

Assessment type: **Internal**

Guided learning hours: **60**

Unit in brief

Learners develop the specialist knowledge and skills required by a customer service practitioner to deliver customer service effectively in face-to-face situations.

It is strongly recommended that learners take part in work experience in a customer service environment in order to develop the understanding and skills for this unit, and to facilitate assessment.

Unit introduction

Customers judge organisations on the ways that staff interact with them and how they show they care about the customer as an individual. You will develop the skills and techniques needed to deliver effective customer service in face-to-face situations. This is important to maintain the image, brand value and reputation of the organisation, retain and increase customer loyalty, reduce complaints, and promote future business.

As a customer service representative, you will deal with a variety of customers in different situations. You will need to use your verbal, non-verbal and interpersonal skills to present a favourable image of the organisation and deliver excellent customer service. You will need to follow legislation, and agreed standards and procedures to meet the increasing demands and preferences of today's customers, including handling challenging situations, and resolving conflict.

This unit will give you the knowledge, vocational skills and personal behaviours to progress to roles such as a sales assistant or customer service adviser in a variety of environments such as administration, finance, retail or hospitality. You could also progress to an Apprenticeship or a Level 3 qualification.

Learning aims

In this unit you will:

A Demonstrate verbal and non-verbal communication skills appropriate to customer service situations

B Deliver customer service to meet the needs and expectations of customers

C Review customer service skills in different situations.

UNIT 2: DELIVERING CUSTOMER SERVICE FACE TO FACE

Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
A Demonstrate verbal and non-verbal communication skills appropriate to customer service situations	**A1** Verbal communication skills **A2** Non-verbal communication skills **A3** First impressions **A4** Interpersonal skills **A5** Types of situation	• Observation record from tutor/supervisor, which can include photographic/video evidence of learners communicating face to face with different types of customer in a variety of situations. • Personal statement that includes a summary of activities and self-evaluation of performance. • Tutor/supervisor and, peer feedback of learners' performance – what went well and what could be improved. • Skills audit and review following practical activities, SWOT (strengths, weaknesses, opportunities, threats) analysis and development plan.
B Deliver customer service to meet the needs and expectations of customers	**B1** Internal and external customers **B2** Customer needs and expectations **B3** Legislation, codes of practice and organisational standards **B4** Teamwork **B5** Dealing with customer conflict and challenge	
C Review customer service skills in different situations	**C1** Individual skills audit of customer service skills **C2** Using feedback to develop and support customer service skills development	

Key teaching areas in this unit include:

Sector skills	Knowledge	Transferable skills/behaviours
• Demonstrating personal pride in the job • Using a range of questioning skills • This unit is mapped to the National Occupational Standards and the Apprenticeship Standards (Customer Service Practitioners)	• Types of customer • Legislation and regulations linked to customer service • Customer needs and expectations • Verbal and non-verbal communications	• Problem solving and communication • Managing information • Self-management and development

Unit content

Knowledge and sector skills

Learning aim A: Demonstrate verbal and non-verbal communication skills appropriate to customer service situations

A1 Verbal communication skills

- Appropriate verbal communication skills, including greeting and addressing customers in line with business and brand guidelines, e.g. pitch and tone of voice; clear, friendly and professional language; formal or informal; non-discriminatory; avoiding use of jargon, slang or technical words; positive language.

A2 Non-verbal communication skills

- Appropriate non-verbal communication skills, including positive and professional body language, e.g. handshake; correct and open posture; facial expressions; making eye contact; approachable; smiling; acknowledging personal space.

A3 First impressions

- Personal and professional presentation in line with organisational standards, e.g. appropriate dress or uniform, including name badge where relevant; hair; jewellery; personal hygiene.
- Welcoming approach, e.g. a positive attitude and appropriate form of customer address.
- Good posture, manners.
- Emotional connectivity.
- Tidy work area and good work ethic.
- Dealing with customers in order of arrival, speed and accuracy of response.

A4 Interpersonal skills

- Appropriate interpersonal skills, e.g. listening and communication skills, flexibility, empathy, respect, courtesy, being conscientious, being motivated, good timekeeping, professionalism, being attentive.
- Ability to clarify information such as initiative, problem solving, persuading and influencing, negotiation, decision making, tact and diplomacy, assertiveness, personal touch and treating customers as individuals.
- Maintaining eye contact, including appropriate use of humour, building and maintaining trust, appropriate conversational skills, and 'safe' small talk.
- Task orientation and working under pressure.

A5 Types of situation

- Routine:
  - providing information about products and/or services
  - promoting additional products and/or services
  - giving advice, taking and relaying messages
  - giving directions
  - locating information or products.

- Non-routine:
  - o dealing with complaints and problems
  - o dealing with customers who have visual, hearing, physical impairments
  - o single customers or a group of people
  - o dealing with difficult/challenging behaviour from a single customer or a group of people
  - o emergency situations.

Learning aim B: Deliver customer service to meet the needs and expectations of customers

B1 Internal and external customers

- Dealing with internal customers such as colleagues, supervisors and managers in own team or other departments.
- Dealing with external customers such as new or existing customers, mail delivery personnel, suppliers, contractors.

B2 Customer needs and expectations

- Customer needs: pricing transparency, accurate descriptions of goods and/or services, including features; functions and benefits; quality of goods and/or services; personal touch.
- Customer expectations: value for money, brand value, standards and levels of service, promised timescales, previous experience, availability of information and after-sales service, how the product or service will meet their needs, effective customer service tone and behaviour, adding personal touch, confirming customer satisfaction.
- Knowledge of product and services: convey knowledge of products and/or services to customers, pricing, quality, refund policies, unique selling point (USP), unique service offer (USO).

B3 Legislation, codes of practice and organisational standards

(Statutes and regulations current at the time of teaching should be used. Outline understanding only is expected.)

- Complying with current legislation, Health and Safety at Work etc. Act 1974, Equality Act 2010, data protection legislation, Consumer Rights Act 2015, Consumer Protection Act 1987, Trade Descriptions Act 1968, Consumer Credit Act 2006.
- Complying with codes of practice or guidelines: industry specific, organisational, professional.
- Organisation mission/vision statements and values.

B4 Teamwork

- Establishing good working relationships with colleagues to deliver service to customers, e.g. communicating service information promptly, concisely and clearly; offering assistance when asked; empathising with colleagues; respecting colleagues; sharing information across the team; requesting assistance when needed; building and maintaining trust with colleagues.
- Flexibility to meet the needs of other colleagues.
- Managing own workloads, e.g. using tools such as to-do lists, schedules.
- Communicating and problem solving.
- Meeting deadlines and keeping commitments to support colleagues.

B5 Dealing with customer conflict and challenge

- Different types of challenging customer such as dissatisfied, impatient, argumentative; customers with language or cultural needs; customers with special needs (visual, hearing, physical impairments); single customers or a group of people.
- Dealing with difficult customers – staying calm and patient, actively listening, using clear and direct language and questions, showing empathy, establishing fact from fiction, showing understanding of the customer viewpoint, offering solutions but not overpromising, explaining next steps in a logical manner, seeking help.
- Escalation procedures and timescales, being aware of the importance of resolving conflict and disagreement.
- Resolving conflict, offering alternative solutions, considering the impact of conflict and disagreement on customers and colleagues.
- Completing records as appropriate.

Learning aim C: Review customer service skills in different situations

C1 Individual skills audit of customer service skills

- Skills audit of own customer service skills:
  - personal SWOT analysis to assess any gaps, e.g. interpersonal and communication skills – body language, listening skills, handling complaints, working with others.
- Setting objectives for skills development plan goals by:
  - identifying resources and the support that is needed and available to meet the objectives
  - setting review dates to monitor the plan to assess progress against targets.

C2 Using feedback to develop and support customer service skills development

- Use feedback from peers to support customer service skills development.
- Use feedback from tutor/supervisor to support customer service skills development.
- Own analysis, recording and review.

Transferable skills

Problem solving and communication

- Finding out the needs and expectations of customers, anticipating requirements, responding quickly, interpreting customer comments and behaviour, adapting to the behaviour of others.

Managing information

- Processing information from customers, providing accurate information, protecting confidential information and data, organising literature.

Self-management and development

- Developing personal skills, setting own goals, receiving feedback, managing own time, liaising with others, prioritising tasks, solving problems.

Assessment criteria

Pass	Merit	Distinction
Learning aim A: Demonstrate verbal and non-verbal communications skills appropriate to customer service situations		
A.P1 Use appropriate verbal, non-verbal and interpersonal skills when dealing with customers in three different routine and non-routine situations.	**A.M1** Demonstrate effective verbal, non-verbal and interpersonal skills when dealing with customers' requirements in three different routine and non-routine situations to meet their different requirements.	**A.D1** Demonstrate consistently confident and effective verbal, non-verbal and interpersonal skills, using own initiative to deal effectively and consistently with customers' requirements in three different routine and non-routine situations.
A.P2 Deliver customer service face to face to meet customer requirements in three different situations.		
Learning aim B: Deliver customer service to meet the needs and expectations of customers		
B.P3 Demonstrate appropriate customer service skills to meet the needs and expectations of internal and external customers.	**B.M2** Demonstrate effective customer service approaches and skills to deal with customers in non-routine and routine situations, liaising effectively with others to escalate problems.	**B.D2** Confidently and consistently demonstrate effective customer service approaches and skills, adapting behaviour and liaising effectively with others to deal proficiently with different customers and situations, and comply with legislation and customer service standards.
B.P4 Deal appropriately with challenge and conflict from two customers, complying with customer service standards and legislation.		
Learning aim C: Review customer service skills in different situations		
C.P5 Prepare a realistic audit and review for own customer service skills.	**C.M3** Prepare a detailed initial audit of own customer service skills and comparative review using feedback from others.	**C.D3** Evaluate the effectiveness of own customer service skills in different situations, using own audit and interpreting feedback from others.

Essential information for assessment decisions

Learning aim A

For distinction standard, learners will:

- consistently demonstrate a confident and flexible approach when dealing with customers (single customers and a group of customers) in a minimum of three different types of routine and non-routine situation. Their approach must show consistent and excellent communication skills while clearly establishing fact from fiction when dealing with these customers

- show consistent control and be confident and flexible, showing initiative when dealing with customers in different situations, making realistic and accurate decisions, and working as a team to resolve customer problems in a timely manner.

For merit standard, learners will:

- demonstrate a confident and flexible approach when dealing with customers (single customers and a group of customers) in a minimum of three different types of routine and non-routine situations. Their approach must show effective listening skills when dealing with different customers and be able to establish fact from fiction

- show effective control and be confident and flexible in dealing with customers in different situations, making appropriate decisions and working as a team to resolve customer problems in a timely manner.

For pass standard, learners will:

- use appropriate approaches when dealing with customers (single customers and a group of customers) in a minimum of three different types of routine and non-routine situation. Their approach will demonstrate appropriate listening skills when dealing with different customers and they might be able to establish fact from fiction

- show appropriate control and be flexible when dealing with customers in different situations, making some decisions and working as a team to resolve customer problems in a timely manner.

Learning aim B

For distinction standard, learners will:

- consistently demonstrate their skills and a positive approach when greeting customers, showing confidence and flexibility in dealing with customers in routine and non-routine situations. Their approach will demonstrate consistent control over the use of appropriate customer service techniques to deal with different types of customer in different situations

- make realistic and accurate decisions in prioritising activities that will help manage customer expectations and needs, and deal with a minimum of three different types of customer in different situations, complying with relevant legislation and standards.

For merit standard, learners will:

- demonstrate their skills and a positive approach when greeting customers while using effective verbal, non-verbal and interpersonal skills when dealing with challenges and conflicts. They will also deal with customers in routine situations, using appropriate techniques to deal with different types of customer in different situations

- make appropriate decisions in prioritising activities that will help manage the customer expectations and needs, and deal with a minimum of three different types of customer in different situations, complying with relevant legislation and standards.

UNIT 2: DELIVERING CUSTOMER SERVICE FACE TO FACE

For pass standard, learners will:

- use the correct approach and skills when dealing with customers (greeting, resolving issues); use appropriate verbal, non-verbal and interpersonal skills when dealing with challenges and conflicts. They will deliver appropriate customer service with different types of customer in different situations

- make appropriate decisions when handling customer expectations and needs, and deal with customers in a minimum of three different types of situation, complying with relevant legislation and customer service standards.

Learning aim C

For distinction standard, learners will:

- prepare a comprehensive audit and evaluation of their customer service skills. They should review and evaluate their development and the effectiveness of their own customer service skills, e.g. after work experience, looking back at their initial skills audit and using feedback from others to justify their conclusions.

For merit standard, learners will:

- prepare a detailed audit of their customer service skills. They should review the development of their customer service skills, taking in feedback from others to form the basis of a realistic analysis and plan for development.

For pass standard, learners will:

- prepare a realistic audit of their customer service skills, carrying out a written review of their own customer service skills using feedback from others.

Assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity. *Section 6* gives information on setting assignments and there is further information on our website.

A suggested structure for summative assessment is shown in the *Unit summary* section, along with suitable forms of evidence. This is for illustrative purposes only and can therefore be adapted to meet local needs or to assess across units where suitable opportunities exist. The information in the *Links to other units* section will be helpful in identifying opportunities for assessment across units.

The following scenario could be used to produce the required evidence for this unit. Centres are free to use comparable scenarios or other forms of evidence, provided that they meet the assessment requirements of the unit.

Suggested scenario

You are working at the customer service desk at a busy event that your centre is hosting. You need to demonstrate your verbal, non-verbal and interpersonal skills, and your ability to deliver customer service to meet the needs and expectations of customers. You will be observed dealing with customers in routine and non-routine situations, including challenging situations.

When demonstrating your skills, your performance will be observed by your tutor (who will take on the role of your supervisor/manager) or your supervisor/manager from either a part-time job or work experience. The observation will be supported by a personal statement that includes a review of your activities in meeting the customer requirements, for example reaction and speed of response, tone of voice, positive body language and following correct procedures. In order to further improve your skills, you will produce a self-evaluation of your performance. Your team members and tutor will also provide feedback on your performance and you will produce a SWOT analysis to be used as the basis for a development plan.

If a retake assessment is necessary, an alternative example must be used. The following is an example of a retake assessment activity.

You are working as a customer service assistant in a department store dealing with a variety of customers with different needs, sometimes in challenging situations. Your tutor will act as your supervisor. You will be observed demonstrating your techniques and skills to deal with customers in routine and non-routine situations.

Further information for tutors and assessors

Delivery guidance

The following are examples of practical activities and workshops that tutors could use when developing sector and transferable skills in the delivery of this unit. Wherever possible, practical activities should be used to help learners develop both personal and sector skills in preparation for the final assessment. These suggestions are not intended as a definitive guide to cover the full GLH of the unit.

Introduction to unit

Tutor-led discussion on the importance of providing excellent face-to-face customer service in roles such as a sales assistant, front-of-house staff or customer service adviser. Learners should be introduced to the range of sectors in which they can pursue a career in customer service, such as administration, finance, retail or hospitality.

Tutors could encourage learners to talk about their own experiences of customer service, e.g. in shops, cafes and restaurants. Learners could compare how organisations differ in their approach to customer service. Learners should identify examples of when they have received excellent customer service and examples of when they have received poor customer service. Learners should identify what makes the difference between good and poor customer service, and how each of the examples discussed made them feel.

A visit to a local organisation, including a masterclass, would be a useful introduction for learners to observe staff dealing with customers face to face, and would allow them to ask questions about customer behaviour and accepted practice.

Learners could use these visits to reflect on the behaviours, skills and techniques observed, and prepare a SWOT analysis of their own existing knowledge and skills.

Suggested time: about 8 hours.

Activity: Legislation, codes of practice and organisational standards

Tutor-led discussion on the importance of complying with legislation and codes of practice. Learners could work in small groups to consider legislative, regulatory and organisational requirements that different types of company have to comply with in order to offer consistent and reliable customer service. Learners could consider how these requirements affect the customer service provided and research media articles to review case studies where organisations have failed to meet their regulatory and legislative requirements, considering the impact on customer service.

Learners could present their findings to their peers in the form of presentations and/or role play to demonstrate their knowledge and skills.

Suggested time: about 6 hours.

Activity: Dealing with customers in routine situations

Tutor-led discussion and demonstration of verbal and non-verbal communication skills.

In pairs, learners could practise their listening skills. One learner could talk about a subject for two minutes without interruption, then the other learner has to summarise what was said.

A masterclass and role play would be useful in helping learners to understand the importance of correct communication, interpersonal skills and body language, both on the part of the customer and on the customer service practitioner. Team members could play the part of customers exhibiting different behaviour and body language so learners can practise responding to the customers. The role play could be extended to include learners exhibiting different behaviour and body language to see the reaction of the customers.

Tutors could discuss with learners what went well and resolve any difficulties that were encountered.

Learners must practise their communication and interpersonal skills to enable them to respond efficiently to routine customers using agreed standards of customer service.

Suggested time: about 12 hours.

Activity: Dealing with customers in non-routine situations

Masterclasses and workshops with local employers/partners would be useful in introducing learners to professional etiquette, customer service standards and how to deal with challenging customers. Supporting videos and role play relating to effective customer service would also benefit learners in their development.

Demonstrations are recommended to ensure nothing is forgotten, and tutors should encourage learners to develop their skills in establishing customer needs and expectations, dealing with customers with special needs, providing relevant information about products and services, adapting to customer behaviour, and complying with legislation.

Role play is essential in helping learners to develop their skills in dealing with customer conflict and challenge. Tutors should encourage learners to develop their personal skills such as patience, confidence and assertiveness, as well as their professional skills, allowing learners to solve problems, compromise with customers and deal calmly and confidently with customers and other people to resolve a variety of difficult situations.

Tutors could discuss with learners what went well and resolve any difficulties that were encountered.

Learners could practise completing records of incidents with customers.

Suggested time: about 12 hours.

Activity: Reviewing customer service performance

Tutors complete reviews on learners' performances in delivering customer service, identifying what learners did well and making suggestions for how they could improve their behaviour and skills.

Learners could review their own performance and the performance of their team members, identifying their strengths and areas for improvement, and using tutor-designed pro formas. A SWOT analysis would prove beneficial to learners; after which they could prepare a development plan outlining three actions to improve their performance.

Suggested time: about 4 hours.

Essential resources

For this unit, learners will need to take part in work experience in a customer service environment in order to develop the skills for this unit.

Links to other units

This unit has strong links to:

- Unit 1: The Customer Service Environment
- Unit 3: Delivering Digital Customer Service
- Unit 4: Improving Customer Service.

Employer involvement

It is strongly recommended that learners take part in work experience in a customer service environment in order to develop the skills for this unit. Where this is not feasible or is insufficient for all assessment, then simulations may be used. Employers must be involved in simulations, for example through being involved in assessment or providing assessment materials such as the provision of customer service information.

This unit would also benefit from employer involvement in the form of masterclasses on:

- how to use communication skills to provide customer service to customers with special requirements and needs, including disabilities
- the key points of the Consumer Rights Act 2015.

Unit 3: Delivering Digital Customer Service

Level: **2**

Unit type: **Mandatory**

Assessment type: **Internal**

Guided learning hours: **60**

Unit in brief

Learners will develop the specialist knowledge and skills required by a customer service practitioner to deliver digital customer service in non-facing, technological settings.

It is strongly recommended that learners take part in work experience in a customer service environment in order to develop the skills for this unit and to generate supporting evidence for assessment.

Unit introduction

Businesses are increasingly encouraging their customers to use technology as a means of communication. They are developing their customer service by directing customers to online services. It is vital that people working in a digital customer service role have the skills and knowledge to be able to deliver excellent customer service through digital technology as the expectations of customers change and become more demanding.

You will deliver reliable and effective customer service using a variety of digital platforms such as live chat, video chat, social media, Short Message Service (SMS) and email, and follow accepted conventions for communications on these platforms. You will deal with routine customer enquiries and requests for products and services, and also with customer problems and complaints. It is essential that you interact effectively with customers using digital technology in order to maintain the reputation, image and brand value of the business. You will need to behave in a way that will help to retain and increase customer loyalty, reduce complaints, secure future business and increase profits.

This unit will give you the knowledge and skills to progress towards roles such as a contact centre operator, customer service adviser or help desk adviser in a variety of environments. These could include banking services, utilities, online retail services, mail order, education or government/local authority services. Alternatively, you could also progress to an Apprenticeship or a Level 3 qualification.

Learning aims

In this unit you will:

A Explore the use of web-based digital technology in the delivery of customer service

B Use appropriate web-based digital technology to deliver customer service

C Communicate formally in writing with customers using digital technology.

UNIT 3: DELIVERING DIGITAL CUSTOMER SERVICE

Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
A Explore the use of web-based digital technology in the delivery of customer service	**A1** Web-based digital technology **A2** Maintaining the security of web-based digital technology	Observation records from tutor or supervisor, supported by learner evidence, which can include:
B Use appropriate web-based digital technology to deliver customer service	**B1** Use a range of web-based digital technology to deliver customer service **B2** Assist customers with routine queries and requests using web-based digital technology **B3** Assist customers with problems or complaints using web-based digital technology	• photographic/video evidence of learners using a range of digital technology platforms to deal with routine and non-routine customers enquiries and problems • screenshots or products of communications with customers • tutor/supervisor and team member feedback (written or recorded) of learner performance with an evaluation of what went well and what could be improved.
C Communicate formally in writing with customers using digital technology.	**C1** Follow organisational guidelines when writing to customers using email **C2** Communication skills and techniques	

Key teaching areas in this unit include:

Sector skills	Knowledge	Transferable skills/behaviours
• Using technology to deliver customer service to routine and challenging customers to make service personal • Processing information about customers • Supporting customers using online customer service	• Interpersonal skills that achieve positive customer engagement • Active listening skills when communicating • Recognise and respond to customer needs and expectations, managing expectations professionally • IT/technical knowledge	• Problem solving • Managing information • Self-management and development • Working with others

Unit content

Knowledge and sector skills

Learning aim A: Explore the use of web-based digital technology in the delivery of customer service

A1 Web-based digital technology

- The role of web-based digital technology in Customer Relationship Management (CRM) systems:
  - what they do
  - what information they collect
  - how/what the information is used for
  - how CRM systems can contribute to organisational performance and levels of customer service.
- The types of digital technology tool used to deliver customer service, to include:
  - databases
  - office systems
  - blogs
  - vlogs
  - email and mass email tools, SMS
  - live chat
  - video chat
  - Skype®
  - social media channels
  - other collaborative tools, including web conferencing and website communities.

A2 Maintaining the security of web-based digital technology

- The importance of maintaining the security of web-based digital technology systems and customer information.
- Individual employee responsibilities in maintaining security, including:
  - following organisational policies and procedures relating to security
  - managing the safety of passwords
  - filing and security of documents and information.
- Organisational policies and standards relating to use of web-based digital technology.
- Data protection legislation, legal principles on privacy and confidentiality issues that arise from the use of web-based digital technology:
  - information obtained and processed fairly and lawfully
  - obtained only for specific purposes
  - adequate, relevant and not excessive
  - accurate and up to date
  - held no longer than is necessary for the registered purpose
  - must be processed in accordance with the rights of the individual, and the individual has the right to see the information held on them
  - surrounded by proper security
  - cannot be transferred to countries outside the EU unless individual gives consent.
- Consumer Credit Act (1974 as amended 2006), legal principles governing retention of credit and personal credit information and files, access to and retention of them.
- Legal rights provided by other consumer legislation such as Consumer Rights Act 2015, Consumer Contracts Regulations 2014.

UNIT 3: DELIVERING DIGITAL CUSTOMER SERVICE

Learning aim B: Use appropriate web-based digital technology to deliver customer service

B1 Use a range of web-based digital technology to deliver customer service

- Digital technology tools used to support the delivery of customer service and their uses.
- The advantages and disadvantages of each and their appropriateness for given situations.
- Passwords and other security measures required for use of digital technology tools.
- Keyboard skills:
  - o pace required by role or situation, e.g. conversational
  - o avoiding spelling and grammatical errors
  - o use of abbreviations, appropriateness to tool used and conventions.
- Confidentiality and security issues of each tool.
- Choice of tool appropriate to situation.

B2 Assist customers with routine queries and requests using web-based digital technology

- Dealing with customer enquiries and requests in a positive and professional way to:
  - o identify customers' needs and expectations, e.g. using both open and closed questions
  - o determine needs, e.g. information on products and services and assist customers in accessing and receiving services
  - o respond to enquiries and requests from customers within agreed response time guidelines, e.g. emails within 24 hours; immediate response to text chat.
- Communicating effectively with customers:
  - o providing information on products and services to meet customer needs and expectations, e.g. the difference between products and services and their features and benefits
  - o being appropriate to each customer exchange, e.g. using appropriate language with correct conventions of spelling and grammar
  - o following a set script, if required, when dealing with customers.
- Communicating with others appropriately to:
  - o recognise when unable to deal with a customer's enquiry or request and when to refer to an appropriate colleague, e.g. an enquiry outside of own area of expertise or knowledge
  - o pass on enquiries and requests to colleagues promptly and efficiently, with the appropriate information
  - o keep customers updated and informed at all times, e.g. any delays in dealing with their enquiry such as passing on to another team
  - o maintain brand standards during the exchange, having confidence to personalise communication where required
  - o add and submit information relating to routine customer enquiries following each exchange, e.g. update customer records
  - o operate effectively as part of a team.

B3 Assist customers with problems or complaints using web-based digital technology

- Dealing efficiently and professionally with problems and complaints:
  - recognising when there is a problem for the customer
  - being attentive and asking questions to clarify issues
  - asking questions to clarify expectations about the problem
  - checking understanding of customer's concerns by describing own view of the situation and options that might be available
  - expressing empathy and communicating in a way that does not make the problem worse
  - agreeing a way forward that balances customer satisfaction with the needs of the organisation, e.g. offering an alternative
  - recognising when unable to deal with a problem or complaint on own and pass on to colleagues promptly and efficiently, with the appropriate information, e.g. full details of a customer's enquiry and details of all exchanges with the customer.
- Dealing calmly and confidently with challenging customers, e.g. customers who are angry, aggressive, abusive, confused, or who have special requirements.

Learning aim C: Communicate formally in writing with customers using digital technology.

C1 Follow organisational guidelines when writing to customers using email

Communicating appropriately and professionally:

- responding within agreed timescales, e.g. within 24 hours
- identifying customers' needs and expectations
- using language that is clear and concise
- adapting language to meet the individual customer's needs
- producing accurate communications and proofreading to check for grammar, spelling and house style
- ensuring any organisational standard template or corporate branding is complied with
- passing on problems or including supervisor, where appropriate, and ensuring no further response is expected by the customer when closing contact
- operating effectively as part of a team
- keeping and filing accurate and complete records
- complying with requirements for sending and storage of confidential or sensitive information, e.g. data protection.

C2 Communication skills and techniques

- Using formal and accurate writing and spelling.
- Using language and technical information appropriate to audience.
- Ensuring professional appearance and content of email complies with organisation's requirements and templates.
- Demonstrating appropriate time and information management skills.

Transferable skills

Problem solving

- Finding out the needs and expectations of customers, anticipating requirements, responding quickly, interpreting customer comments and behaviour, adapting to the behaviour of others, considering options to make sound decisions, managing limits of own authority, handling complaints, developing skills in seeking solutions and solving problems.

Managing information

- Processing information from customers, providing accurate information, protecting confidential information and data, company literature, use of technology/screens to locate and provide information.

Self-management and development

- Developing personal skills, setting own goals, receiving feedback, managing own time, liaising with others, prioritising tasks; solving problems.

Working with others

- Working with others to identify, define and solve problems; using effective verbal and non-verbal communication to interact with others; providing instructions and information to others; listening and questioning skills.

Assessment criteria

Pass	Merit	Distinction
Learning aim A: Explore the use of web-based digital technology in the delivery of customer service		
A.P1 Outline the types of web-based digital technology used to support the delivery of reliable customer service in a given business.	**A.M1** Explain the importance of using appropriate digital technology to maintain security and comply with legal requirements in a given business.	**A.D1** Assess how customer relationship managements systems are contributing to organisational performance, security and levels of customer service in a given business.
A.P2 Describe how security issues can arise with web-based technologies used for the delivery of reliable customer service.		
Learning aim B: Use appropriate web-based digital technology to deliver customer service		
B.P3 Demonstrate selection and use of appropriate types of web-based digital technology to assist customers with routine queries and requests for products and services.	**B.M2** Demonstrate selection and use of appropriate types of web-based digital technology to provide effective customer service to customers with problems or complaints about products and services.	**B.D2** Demonstrate confident and effective customer service skills using different digital technology to deal with problems and complaints, justifying the choice of technology used for resolution.
B.P4 Demonstrate selection and appropriate use of web-based digital technology to assist customers with problems.		
Learning aim C: Communicate formally in writing with customers using digital technology.		
C.P5 Demonstrate communication with customers by email using acceptable written communication skills and techniques.	**C.M3** Demonstrate effective communication with customers by email using appropriate written communication skills and techniques.	**C.D3** Demonstrate professional formal communication with customers, using initiative to resolve customer queries, problems and complaints.

Essential information for assessment decisions

Learning aim A

For distinction standard, learners will:

* assess how web-based digital technologies support the delivery of reliable customer service, giving relevant examples. Learners will demonstrate a good understanding of the uses of web-based technology and how these contribute to the effective delivery of reliable customer service and how customer relationship managements systems are contributing to organisational performance and levels of customer service, giving relevant examples and providing a conclusion in relation to the business selected for study

* discuss how to maintain the security of web-based technologies used for the delivery of reliable customer service and the responsibilities of individuals in helping to maintain security of systems and information. Learners will consider the legislation, professional ethics, privacy and confidentiality issues that arise from the use of web-based digital technology. They will be conversant with the different legislation that impacts on the use of web-based digital technology to deliver reliable customer service and the organisational policies and procedures that exist to ensure legislation is met by the selected business.

For merit standard, learners will:

* explain at least three web-based digital technologies used in supporting the delivery of reliable customer service and give the features of these. Learners will further explain how web-based digital technologies support the delivery of reliable customer service, giving relevant examples from a selected business. Learners will demonstrate a good understanding of the uses of web-based technology and how these contribute to the effective delivery of reliable customer service

* explain the importance of maintaining the security of web-based technologies used for the delivery of reliable customer service and of the responsibilities of individuals in helping to maintain security of systems and information. Learners will include the legislation, professional ethics, privacy and confidentiality issues that arise from the use of web-based digital technology. Learners will be conversant with the different legislation that impacts on the use of web-based digital technology to deliver reliable customer service, and the organisational policies and procedures that exist to ensure legislation is met.

For pass standard, learners will:

* outline at least three web-based digital technologies used in supporting the delivery of reliable customer service and give a brief outline of the features of these in the selected business

* describe how to maintain the security of web-based technologies used for the delivery of reliable customer service and give the responsibilities of individuals in helping to maintain security of systems and information.

Learning aim B

For distinction standard, learners will:

- use different types of web-based digital technology to assist customers with routine queries and requests about products and services (at least three types of technology). Learners will demonstrate confidence in using the functions of web-based digital technology systems, and justify their choice and appropriateness to the situation

- assist customers (at least two customers) with routine enquiries and requests about products and services using web-based digital technology. Learners will demonstrate knowledge of an organisation's products and services and their features and benefits, differentiating between products and services. Learners will confidentally and consistently demonstrate the skills required to assist customers with enquires and requests, and will meet the needs and expectations of their customers. Tasks should be complex and may require input from multiple sources or require a substantial timeframe to complete. Learners should be able to use their initiative to deal with customer enquiries and requests

- assist an additional two customers with problems or complaints using web-based digital technology. Learners will confidently and consistently demonstrate customer service skills in dealing with customer problems or complaints and will reach a satisfactory outcome with customers by resolving problems and complaints. Tasks should be complex and may require input from multiple sources or require a substantial timeframe to complete. Learners should use their initiative to resolve customer problems or complaints.

For merit standard, learners will:

- use at least three types of web-based digital technology to assist customers with routine queries and requests about products and services. Learners will demonstrate effective use of the basic functionality of web-based digital technology systems

- assist customers (at least two customers) with routine enquiries and requests about products and services using web-based digital technology. Learners will demonstrate knowledge of an organisation's products and services and their features and benefits, differentiating between products and services. Learners will effectively demonstrate the skills required to assist customers with routine enquires and requests, and will meet the needs and expectations of their customers. Tasks should be straightforward and not require input from multiple sources or require a substantial timeframe to complete

- assist an additional two customers with problems or complaints using web-based digital technology. Learners will demonstrate effective customer service skills in dealing with customers' problems or complaints and will reach a satisfactory outcome with customers by resolving problems and complaints. Tasks should be straightforward and not require input from multiple sources or require a substantial timeframe to complete.

For pass standard, learners will:

- use at least three types of web-based digital technology to assist customers with routine queries and requests about products and services. Learners will use the basic functionality of web-based digital technology systems but they will lack the confidence to use the range of functions and will show hesitation

- assist (at least two) customers with routine enquiries and requests about products and services using web-based digital technology. Learners will demonstrate knowledge of an organisation's products and services and their features and benefits, differentiating between products and services. Learners will demonstrate some of the skills required to assist customers with routine enquires and requests but will lack fluency and experience and will likely need continuous instructions and feedback to complete the activities. Tasks should be straightforward and not require input from multiple sources or require a substantial timeframe to complete

- assist an additional two customers with problems using web-based digital technology. Learners will demonstrate some skills in dealing with customers' problems or complaints but will lack fluency and experience, and will likely need continuous instructions and feedback to complete the activities. Learners may have to refer customers' problems or complaints to others to resolve as they are out of their area of knowledge or expertise. Tasks should be straightforward and not require input from multiple sources or require a substantial timeframe to complete.

Learning aim C

For distinction standard, learners will:

- communicate with customers using email, including one routine enquiry or request and one problem or complaint. Learners will use written communication skills and techniques that are acceptable and appropriate to the work situations and that convey the intended message effectively. Their written communications will be confident and will consistently demonstrate an appropriate level of formality, tone of voice, and body language relevant to the situations and the messages being communicated. Written communications will not contain any flaws and will clearly convey the intended message, and be in line with acceptable professional business standards. Learners will demonstrate initiative and suggest actions that can be taken to minimise interruptions and delays to service.

For merit standard, learners will:

- communicate with customers using email, including one routine enquiry or request and one problem or complaint. Learners will use written communication skills and techniques that are acceptable and appropriate to the work situations, and that convey the intended message effectively. Their written communications will demonstrate an appropriate level of formality, tone of voice and body language relevant to the situations and the messages being communicated. Written communications will not contain any flaws and will clearly convey the intended message, and be in line with acceptable business standards. Learners will demonstrate actions that can be taken to minimise interruptions and delays to service.

For pass standard, learners will:

- communicate with customers using email, including one routine enquiry or request and one problem or complaint. Learners will use written communication skills and techniques that are acceptable to the work situations and that convey the intended message. Their written communications will demonstrate an appropriate level of formality, tone of voice and body language relevant to the situations and the messages being communicated. Written communications may have minor flaws such as punctuation and formatting but still convey the intended message clearly and be in line with acceptable business standards.

Assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity. *Section 6* gives information on setting assignments and there is further information on our website.

A suggested structure for summative assessment is shown in the *Unit summary* section, along with suitable forms of evidence. This is for illustrative purposes only and can therefore be adapted to meet local needs or to assess across units where suitable opportunities exist. The information in the *Links to other units* section will be helpful in identifying opportunities for assessment across units.

The following scenario could be used to produce the required evidence for this unit. Centres are free to use comparable scenarios or other forms of evidence, provided that they meet the assessment requirements of the unit.

Suggested scenario

You are working for the local authority as a customer service representative working in a digital environment. You need to develop your skills in providing customer service to a range of different customer types in different customer service situations, using web-based digital technology.

You will need to demonstrate effective customer service and communication skills, and meet the needs and expectations of your customers within the limits of your own role. You will be observed over a period of time using at least three types of web-based digital technology to assist at least two customers, with routine requests about products and services, and assisting with at least two customers with problems or complaints, using web-based digital technology.

When demonstrating your customer service skills, your performance will be observed by your tutor (who will take on the role of your supervisor/manager) or your supervisor/manager if in a workplace.

The observation will be supported by product evidence in the form of screenshots or evidence of communications with your customers. In order to further improve your skills, you will produce a self-evaluation of your performance. Your team members and tutor will also provide feedback on your performance and you will produce a SWOT analysis to be used as the basis for a development plan.

If a retake is necessary, an alternative example must be used. The following is an example of a retake assessment activity.

You are working on the help desk of a mail order company helping customers navigate the website to view and order goods. You will communicate in writing using web-based digital technology with a variety of customers, including those with challenging behaviour. Your tutor will act as your supervisor. You will be observed demonstrating your techniques and skills to deal with routine and non-routine customers using digital technology.

Further information for tutors and assessors

Delivery guidance

The following are examples of practical activities and workshops that tutors could use when developing sector and transferable skills in the delivery of this unit. Wherever possible, practical activities should be used to help learners develop both personal and sector skills in preparation for the final assessment. These suggestions are not intended as a definitive guide to cover the full GLH of the unit.

Introduction to unit

An introduction to this unit should outline the sector skills, transferable skills, knowledge and behaviours of the unit, and how achievement of the unit could lead to a future career as a contact centre operator, customer service adviser or help desk adviser in a variety of environments, including banking services, utilities, online retail services, mail order, education or government/local authority services.

Delivery of this unit must focus on providing learners with appropriate learning opportunities for each of the activities specified in the unit content. Before assessment, learners are required to develop the necessary skills, knowledge and behaviours to undertake these activities with confidence.

Suggested time: about 2 hours.

Activity: Web-based digital technology

In the first instance, the tutor should aim to introduce learners to a varied range of web-based digital technology platforms as outlined in the content. All further activities will allow learners to apply their knowledge of web-based digital technology and use a range of these platforms to deliver reliable customer service.

Learners could spend time looking at the different types of web-based digital technology platforms available to organisations and how the different platforms are used, supporting those learners with less knowledge. Customer Relationship Management (CRM) systems could be introduced here. Learners should be encouraged to discuss the features of each of these platforms and make simple comparisons between each platform.

Once there is a good understanding of the web-based digital technology platforms, learners could look at how different companies use technology in their customer service offer. Learners should be introduced to the demands of today's customers and the move towards the use of technology on the part of the customer and the customer service representative.

Learners could undertake group work where each group is given a different type of company/industry to explore and research. Small group presentations could be used to share the research findings.

The tutor could find examples of blogs and 'how to' videos, and any other similar tools used by organisations, to discuss with learners the value and use of these blogs and/or video clips.

Positive aspects and limitations could be explored, followed by learners undertaking their own research to find other examples of how blogs and video clips are used by organisations in their customer service offer. Group discussion could then follow to discuss how improvements could be made.

Suggested time: about 10 hours.

Activity: Maintaining the security of web-based digital technology

Learners could research incidents of security breaches related to web-based digital technology. Tutor-led discussion on how businesses maintain security and within this, learners should be encouraged to discuss how they can individually contribute to maintaining security of systems and both customer and organisational information.

Learners could research the industry codes of practice and legislation that are related to their job, volunteer work, work experience or case study, and the impact this has on technology in customer service. Learners could present their findings to the group to share their knowledge and experience.

Suggested time: about 5 hours.

Activity: Use a range of web-based digital technology to deliver customer service

Masterclass by a local employer to talk about the digital technology they use as part of their customer service offer to engage with their customers. The session should include how the employer deals with difficult and verbally aggressive customers. The masterclass should cover the skills that the employer requires their workforce to have to enable them to use the technology, along with the customer service skills that sit with the technology, how they link and the importance of the two skill sets coming together.

Learners could complete a self-assessment of their existing skills set against those described by the employer, identifying any areas they need to develop further.

A group activity looking at the usefulness of action planning to improve personal development would be useful in helping learners to identify areas for development. The tutor could introduce SMART (specific, measureable, achievable, realistic, time bound) objectives, explaining what these are, and putting the learners into groups to practise composing them.

A visit to a local company that uses technology to deliver customer service to their customers would also be useful for learners to gain an insight into communication skills and how technology is used in practice. Learners could reflect on the visit to compare their existing knowledge and skills to prepare a SWOT analysis or development plan.

Suggested time: about 5 hours.

Activity: Follow organisational guidelines when writing to customers using email

Learners could practise composing emails to send to customers at different stages of their complaint to keep them informed of progress.

Suggested time: about 6 hours.

Activity: Preparing for assessment

Tutors complete reviews on learners' performances in delivering customer service using digital technology, identifying what learners did well and making suggestions for how they could improve their behaviour and skills.

Learners could review their own performances and those of their team members, identifying their strengths and areas for improvements, and using tutor-designed pro formas. A SWOT analysis would prove beneficial to learners, after which they could prepare a development plan outlining three actions to improve their performance.

Suggested time: about 3 hours.

Links to other units

This unit draws on the knowledge and skills taught in:

- Unit 1: The Customer Service Environment
- Unit 2: Delivering Customer Service Face to Face
- Unit 4: Improving Customer Service.

Employer involvement

It is strongly recommended that learners take part in work experience in a customer service environment in order to develop the skills for this unit. Where this is not feasible or is insufficient for all assessment, then simulations may be used. Employers must be involved in simulations, for example through being involved in assessment or providing assessment materials such as the provision of customer service information.

Unit 4: Improving Customer Service

Level: **2**

Unit type: **Mandatory**

Assessment type: **Internal Synoptic**

Guided learning hours: **60**

Unit in brief

Learners develop an understanding of the importance of continuous improvement in customer service, the use of customer feedback in making improvements and how to recommend ways to improve customer service in an organisation.

It is strongly recommended that learners take part in work experience in a customer service environment in order to develop the understanding and skills for this unit and to facilitate assessment.

Unit introduction

As customers' expectations of customer service rise, it is important that those working in the customer service sector are aware of this and make changes to improve their service to meet these expectations. With an increasing demand for customer feedback in service-led organisations, it is likely that customer service assistants will be involved in interpreting customer feedback in order to identify and recommend improvements that meet the changing needs and expectations of customers.

In this unit, you will develop an understanding of the importance of continuous improvement and how customer feedback is used in improving customer service. You will draw on your knowledge of good customer service from the other units in this qualification to identify and make suitable recommendations for improving customer service.

The transferrable skills you develop in this unit will help you to progress to employment as a customer service assistant or call centre adviser.

Learning aims

In this unit you will:

A Explore the importance of continuous improvement in customer service

B Investigate the use of customer feedback to inform continuous improvement in customer service

C Interpret customer feedback and recommend improvements to customer service within an organisation.

UNIT 4: IMPROVING CUSTOMER SERVICE

Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
A Explore the importance of continuous improvement in customer service	**A1** Continuous improvement in customer service **A2** Organisational factors affecting continuous improvement **A3** Importance of continuous improvement	• Presentation slides on how a selected organisation benefits from improvements in customer service and collects and uses customer feedback, and how well the organisation uses the feedback collected. • Detailed speaker notes and research evidence.
B Investigate the use of customer feedback to inform continuous improvement in customer service	**B1** Methods of collecting customer feedback **B2** Considerations in collecting customer feedback **B3** Using customer feedback to make improvements in customer service	
C Interpret customer feedback and recommend improvements to customer service within an organisation	**C1** Interpreting customer feedback **C2** Recommending opportunities for improvements	• A report making recommendations for improvements in customer service.

Key teaching areas in this unit include:

Sector skills	Knowledge	Transferable skills/behaviours
• Using basic statistics to analyse customer feedback • Interpreting customer feedback • Recommending improvements to customer service	• Importance of continuous improvement in customer service • Factors affecting continuous improvement • Sources of customer feedback • Uses of customer feedback • Types of customer service improvements	• Working with others • Problem solving • Managing information

Unit content

Knowledge and sector skills

Learning aim A: Explore the importance of continuous improvement in customer service

A1 Continuous improvement in customer service

- Definition of continuous improvement, including links to quality assurance and quality control.
- Types of continuous improvement in customer service, including improving existing processes, using innovation to improve products and services, changes to procedures, staff training, solving problems for customers.
- Specific areas for continuous improvement, e.g. timeliness, consistency, accessibility, accuracy, responsiveness, cost.
- Process of carrying out continuous improvement:
  o plan – current status, aims and objectives, success factors, legal requirements
  o do – implementing the plan, including activities to deliver the plan, tools and equipment, human resources, training
  o check – checking performance and assessing risks
  o act – reviewing performance, acting on lessons learned.

A2 Organisational factors affecting continuous improvement

- Motivation and commitment to making changes – managers and staff taking ownership to make improvements.
- Resistance to change – attitude of staff to make changes; flexibility in approach.
- Processes and resources to support implementation.
- Training and development of staff – awareness of continuous improvement, problem-solving skills, learning new technical skills to support changes.

A3 Importance of continuous improvement

- Benefits of continuous improvement in customer service:
  o creating a better customer experience
  o increased customer retention and customer loyalty
  o customer satisfaction
  o competitive advantage
  o improved relationships with customer
  o increased efficiency and reduction in costs
  o increased sales and revenue
  o ability to react to shifts and trends in customer expectations and needs.
- Consequences of not carrying out continuous improvements, e.g. potential non-compliance with regulatory requirements, negative customer reviews and feedback.

UNIT 4: IMPROVING CUSTOMER SERVICE

Learning aim B: Investigate the use of customer feedback to inform continuous improvement in customer service

B1 Methods of collecting customer feedback

- Content of feedback, e.g. quality of product/service, speed of service, clarity and accuracy of information, staff helpfulness and approach, potential improvements, complaints.

- Methods of collecting customer feedback:
  - o planned customer research:
    - – surveys, including use of questionnaires and basic questionnaire design, e.g. types of question, order of questions, language, number of questions
    - – focus groups, including definition and format
    - – interviews – comparison to surveys, interview techniques
  - o customer response/feedback cards and feedback boxes
  - o social media comments and posts
  - o product reviews – online and print
  - o organisational website – tracking user activity using analytics, customer comment features
  - o everyday face-to-face interactions with customers
  - o usability tests.

B2 Considerations in collecting customer feedback

- Advantages and disadvantages of different methods of collecting customer feedback, including aspects of cost, efficiency and customer accessibility.

- Data protection regulation – collecting, maintaining and storing customer personal information.

- Organisation size – small and large organisations.

- Risks to information security.

- Availability of resources – equipment, people, time.

- Credibility of sources of feedback.

B3 Using customer feedback to make improvements in customer service

Organisational uses of customer feedback:

- identifying current and emerging customer needs and expectations

- identifying innovation and improvements in products/services

- measuring customer perception, e.g. what customers are thinking

- measuring customer satisfaction, e.g. are customers happy?

- identifying service failures, e.g. where the organisation is going wrong

- assessing the competition, e.g. comparing brands, brand loyalty

- supporting decision making.

Learning aim C: Interpret customer feedback and recommend improvements to customer service within an organisation

C1 Interpreting customer feedback

- Use of basic descriptive statistics such as mean, mode, median and range, percentages.

- Use of charts and other visual elements to present information.

- Identifying patterns and trends in feedback to draw conclusions.

- Use of computer software in processing and interpreting feedback, e.g. spreadsheets.

- Presenting the findings in an agreed format, e.g. report, presentations.

C2 Recommending opportunities for improvements

- Using patterns and trends to identify opportunities for improvement.
- Considering constraints on implementing improvements, including costs, staff resources, time, differing customer and staff perceptions, legislation and regulations.
- Making a decision on opportunity for improvement, considering constraints.
- Presenting recommendations for making improvements on a specific area, e.g. response times, availability and quality of customer information, product knowledge, staff technical skills.
- Follow organisational procedures in making recommendations.

Transferable skills

Working with others

- Working responsibly and reliably with others in collecting feedback, communicating effectively with colleagues and customers, being respectful and considerate, being proactive in encouraging others to contribute.

Problem solving

- Finding out the needs and expectations of customers, anticipating requirements, considering options to make sound decisions, managing limits of own authority, skills in seeking solutions and solving problems.

Managing information

- Interpreting feedback from customers, protecting confidential information and data, sharing information with others, using technology to manage information.

Assessment criteria

Pass	Merit	Distinction
Learning aim A: Explore the importance of continuous improvement in customer service		
A.P1 Describe the improvements to customer service made by a chosen organisation.	**A.M1** Explain the benefits to the organisation of improving customer service.	**A.D1** Analyse organisational factors that affect continuous improvement in the organisation.
Learning aim B: Investigate the use of customer feedback to inform continuous improvement in customer service		
B.P2 Describe how a chosen organisation collects feedback from customers.	**B.M2** Explain how the organisation collects and uses customer feedback to inform continuous improvements in customer service.	**B.D2** Assess the effectiveness of the organisation in using customer feedback to make improvements to customer service.
B.P3 Outline the ways in which the organisation uses customer feedback to improve customer service.		
Learning aim C: Interpret customer feedback and recommend improvements to customer service within an organisation		
C.P4 Outline recommendations for improving a specific area of customer service in a chosen organisation based on the interpretation of the customer feedback.	**C.M3** Provide detailed recommendations for improving a specific area of customer service in the organisation, based on the interpretation of customer feedback.	**C.D3** Provide detailed recommendations for improving a specific area of customer service in the organisation, using the interpretation of customer feedback to justify the recommendations.

Essential information for assessment decisions

Learning aims A and B

For distinction standard, learners will:

- provide an analysis of the factors within the organisation that impact on its ability to make continuous improvements to customer service. They will give examples of factors specific to the organisation and will explain how each of these impact on continuous improvements in customer service

- assess how effective the organisation has been at using its customer feedback to make improvements to customer service. They will give a detailed description of the amount and type of customer feedback the organisation receives and then explain the extent to which this is being used effectively to improve customer service. Their explanation will be supported by reasoned arguments and examples of the improvements made and/or improvements that could have been made. The assessment will be clear and easy to follow, and must be accompanied by speaker notes and research evidence.

For merit standard, learners will:

- provide an explanation of the benefits to the organisation of improving customer service. They will show, using suitable examples, the benefits to the organisation and the links between different types of continuous improvements in customer service and specific areas such as costs

- explain the methods used by the organisation to collect customer feedback, including why these methods were adopted by the organisation. Learners will provide detailed explanation, supported by specific examples, of the ways in which the organisation uses the customer feedback to inform continuous improvement to customer service. The explanation will be clear and easy to follow, and will be accompanied by speaker notes and research evidence.

For pass standard, learners will:

- provide a description of the different improvements to customer service made by a chosen organisation

- describe the methods used by the organisation to collect customer feedback and may include some reasons why these methods were adopted by the organisation. Learners will outline the ways in which the organisation uses the customer feedback to inform continuous improvement to customer service, e.g. to innovate or create new products, identify areas of service failure, assess the competition, etc. The explanation will be clear and easy to follow, and might be accompanied by speaker notes and research evidence.

Learning aim C

For distinction standard, learners will:

- interpret customer feedback and provide detailed information on the recommendations for making improvements to a specific area of customer service, using evidence from their interpretations to justify the recommendations. The recommendations must be relevant and valid in the context of a specific area of customer feedback such as product improvement and innovation, or customer satisfaction, and must be plausible and capable of being implemented.

For merit standard, learners will:

- interpret customer feedback and provide detailed information on the recommendations for making improvements to a specific area of customer service. The recommendations must be relevant and valid in the context of a specific area of customer feedback such as product improvement, or customer satisfaction, and must be plausible and capable of being implemented.

For pass standard, learners will:

- interpret customer feedback and outline recommendations for making improvements to a specific area of customer service. The recommendations must be relevant and relate directly to the improvement of a specific area of customer feedback such as product improvement, or customer satisfaction, and must be capable of being implemented.

Assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity. *Section 6* gives information on setting assignments and there is further information on our website.

A suggested structure for summative assessment is shown in the *Unit summary* section, along with suitable forms of evidence. This is for illustrative purposes only and can therefore be adapted to meet local needs or to assess across units where suitable opportunities exist. The information in the *Links to other units* section will be helpful in identifying opportunities for assessment across units.

The following scenario could be used to produce the required evidence for this unit. Centres are free to use comparable scenarios or other forms of evidence, provided that they meet the assessment requirements of the unit.

Suggested scenario

You are required to use information from the organisation where you have recently completed work experience or from another organisation where you have access to the relevant information to use as a basis for your assessment.

You are required to:

- prepare a presentation showing:
  - the specific improvements to customer service made by the organisation and how the organisation has benefited from these improvements
  - the factors in the organisation that affect its ability to make continuous improvements
  - how the organisation collects and uses customer feedback to inform and implement improvements to customer service
  - how effective the organisation has been at using customer feedback to improve customer service
- interpret the customer feedback made available by the organisation and prepare a report detailing recommendations for improvements to a specific area of customer service that the organisation could make. Your recommendations must be supported by valid reasons based on the customer feedback.

Further information for tutors and assessors

Delivery guidance

The following are examples of practical activities and workshops that tutors could use when developing sector and transferable skills in the delivery of this unit. Wherever possible, practical activities should be used to help learners develop both personal and sector skills in preparation for the final assessment. These suggestions are not intended as a definitive guide to cover the full GLH of the unit.

Introduction to unit

An introduction to the unit should include the purpose of the synoptic unit and how it gives learners the opportunity to use the knowledge, understanding, skills and behaviours developed in the other units to develop confidence and competence in improving customer service.

Learners will be very familiar with the concept of customer feedback and so it would be good to get them talking about their experiences of either providing feedback or using feedback from others to make buying decisions.

Learners could carry out research into well-known organisations to explore published information relating to the different approaches these organisations use to engage customers in offering information about how they can improve. These may include 'contact us' pages of websites, online product and/or service review facilities, or dedicated complaints policies and procedures, and how organisations use customer feedback to achieve organisational success.

Group activities exploring online organisations such as Amazon®, eBay®, Facebook® and TripAdvisor® will familiarise learners with customer feedback and how customers use this information to inform buying decisions. Learners would benefit from discussing their own experiences of leaving product and/or service reviews and feedback, as well as giving examples of product or service reviews they have used to make decisions about products to buy, restaurants to visit, or films to watch.

Suggested time: about 6 hours.

Activity: Explore the importance of continuous improvements in customer service

Case studies exploring how different organisations carry out continuous improvements will be an important resource for learners to understand this topic. Case studies can be looked at in groups or used in whole-class discussions. Discussions should draw out the need for continuous improvements in customer service, the different areas for making improvements, the process of making improvements, and the challenges and factors that organisations need to consider in carrying out continuous improvement.

Suggested time: about 8 hours.

Activity: Explore the use of customer feedback to inform continuous improvements in customer service

Group discussions to explore the different methods of collecting customer feedback, including those typically used for capturing face-to-face feedback, written feedback using paper-based approaches, and digital feedback. Learners should carry out activities that explore the purpose and features, as well as the pros and cons of using these feedback methods. Learners would benefit from seeing examples of a range of methods, which includes questionnaires, suggestion or complaint cards, and online review and feedback pages. Where possible, they should explore the design, structure and questions included in different types of feedback capture methods.

Tutor-led presentations should be given, discussing the increased use of customer feedback in service-led industries, and how organisations now consider customer reviews and feedback as an essential aspect of their continuous improvement processes. The use of case studies to explore how organisations use customer feedback in identifying and implementing improvements to customer service will be useful.

Suggested time: about 6 hours.

Activity: Interpret customer feedback and suggest improvements to customer service in an organisation

Tutor-led presentations around different tools for organising and interpreting customer feedback will be useful for learners; they should cover areas such as how to group similar comments and responses to identify patterns and trends, and how to carry out basic statistical calculations from ratings and scores using graphical representations to interpret the data.

Tutor-led discussions suggesting improvements to a specific area of customer services could then follow; this should cover the different ways customer service can be improved in different organisations. Learners will also discuss the different areas of customer services that can be improved such as product/service improvements, customer satisfaction/experience. Local employers can be invited to discuss how they collect and interpret customer feedback and use the feedback to help improve their services.

Suggested time: about 8 hours.

UNIT 4: IMPROVING CUSTOMER SERVICE

Essential resources

For this unit, learners will need access to suitable and sufficient information in the form of customer feedback.

Links to other units

This unit draws on the knowledge and skills taught in:
- Unit 1: The Customer Service Environment
- Unit 2: Delivering Customer Service Face to Face
- Unit 3: Delivering Digital Customer Service.

Employer involvement

This unit would benefit from employer involvement in the form of suitable work experience. Where this is not feasible, simulations may be used. Employers must be involved in the assessment of learners, for example through supporting the assessment process by providing customer feedback data for learners to interpret.

4 Planning your programme

Is there a learner entry requirement?

As a centre, it is your responsibility to ensure that recruited learners have a reasonable expectation of success on the programme. There are no formal entry requirements but we expect learners to have qualifications at or equivalent to Level 1.

Learners are most likely to succeed if they have:

- three or four GCSEs at intermediate grades and/or
- BTEC qualification(s) achieved at least at Level 1
- at least Level 1 equivalent achievement in English and mathematics through GCSE or Functional Skills.

Learners may demonstrate ability to succeed in various ways. For example, learners may have relevant work experience or specific aptitude shown through diagnostic tests or non-education experience.

What is involved in becoming an approved centre?

All centres must be approved before they can offer this qualification – so that you are ready to assess learners and so that we can provide the support needed. Further information is given in *Section 8 Administrative arrangements*.

What level of sector knowledge is needed to deliver this qualification?

We do not set any requirements for tutors but expect centres to assess the overall skills and knowledge of the teaching team to ensure that they are relevant and up to date with current industry practice. This will give learners a rich programme to prepare them for progression.

What resources are required to deliver this qualification?

As part of your centre approval, you will need to show that the necessary material resources and workspaces are available to deliver the qualification. For some units, specific resources are required.

What makes good vocational teaching?

The approach to vocational teaching must be led by what is right for the particular sector. Therefore, each unit includes delivery guidance and suggested assessment tasks. Using the delivery guidance and suggested assessment tasks and our additional free delivery guidance and assignment briefs, you can build a course that contextualises learning in real-life and/or employment scenarios. This will naturally draw in the kind of broader attributes valued in the sector, for example, provide a personalised customer experience in customer service, as well as the more general skills needed in work that fit well with project-based learning, for example teamwork, independent learning.

What are the requirements for meaningful employer involvement?

This qualification has been designed as a Technical Certificate qualification and as an approved centre you are required to ensure that during their study, every learner has access to meaningful activity involving employers. See *Section 2 Structure* and *Section 9 Quality Assurance* for the requirements for employer involvement.

Support for employer involvement

It is important that you give learners opportunities that are of high quality and that are directly relevant to their study. We will support you in this through guidance materials and by giving you examples of best practice. See *Section 11 Resources and support* for details of the support available, including the Work Experience Toolkit.

What support is available for delivery and assessment?

We provide a wealth of support materials, including schemes of learning, delivery plans, assignment briefs, additional papers for external assessments and examples of marked learner work.

To support you with planning your assessments, you will be allocated a Standards Verifier early in the planning stage. There will be extensive training programmes and support from our Subject Advisor team.

For further details see *Section 11 Resources and support*.

How will my learners become more employable through this qualification?

This qualification is mapped to the national occupational standards for Customer Service, as detailed below:

- CFACSA1 Maintain a positive and customer-friendly attitude
- CFACSA2 Behave in a way that gives a good customer service impression
- CFACSA3 Communicate effectively with customers
- CFACSA4 Give customers a positive impression of yourself and your organisation
- CFACSA10 Deal with customers face to face
- CFACSF1 Communicate in a customer service environment.

Learners will be acquiring the key technical and sector knowledge, and practical and technical skills that employers need. Employability skills, such as teamworking and communication, and completing realistic tasks have been built into the design of the learning aims and content. This gives tutors the opportunity to use relevant contexts, scenarios and materials to enable learners to develop a portfolio of evidence that demonstrates the breadth of their skills and knowledge in a way that equips them for employment.

5   Assessment structure

The Pearson BTEC Level 2 Technical Certificate in Customer Service Operations is assessed using a combination of *internal assessments*, which are set and marked by tutors, and an *external assessment*, which is set and marked by Pearson.

We have taken great care to ensure that the assessment method chosen is appropriate to the content of the unit and is in line with requirements from employers.

In developing an overall plan for delivery and assessment for the programme, you will need to consider the order in which you deliver units, whether delivery is over short or long periods and when assessment can take place.

One internally-assessed unit in the qualification is defined as synoptic (see *Section 2 Structure*). A synoptic assessment is one that a learner should take later in a programme and in which they will be expected to apply learning from a range of units. As such, you must plan the assignments so that learners can demonstrate learning from across their programme.

We have addressed the need to ensure that the time allocated to final assessment of internal and external units is reasonable so that there is sufficient time for teaching and learning, formative assessment and development of transferable skills.

In administering internal and external assessment, the centre needs to be aware of the specific procedures and policies that apply, for example to registration, entries and results. An overview with signposting to relevant documents is given in *Section 8 Administration arrangements*.

6 Internal assessment

This section gives an overview of the key features of internal assessment and how you, as an approved centre, can offer it effectively. The full requirements and operational information are given in the *Pearson Guide to Quality Assurance* available on our website. All members of the assessment team need to refer to this document.

For this qualification, it is important that you can meet the expectations of stakeholders and the needs of learners by providing a programme that is practical and applied. You can tailor programmes to meet local needs and use links with local employers and the wider vocational sector.

When internal assessment is operated effectively, it is challenging, engaging, practical and up to date. It must also be fair to all learners and meet national standards.

Principles of internal assessment

Our approach to internal assessment for this qualification offers flexibility in how and when you assess learners, provided that you meet assessment and quality assurance requirements. You will need to take account of the requirements of the unit format, which we explain in *Section 3 Units*, and the requirements for delivering assessment given in *Section 8 Administrative arrangements*.

Operating internal assessment

The assessment team

It is important that there is an effective team for internal assessment so that all assessment is planned and verified. For this qualification, it is likely that the team will be small but it is still necessary to ensure that the assessment process is followed. Full information is given in the *Pearson Guide to Quality Assurance*.

The key roles are:

- the Lead Internal Verifier (Lead IV) for the qualification has responsibility for the planning, record keeping and standard setting for the qualification. The Lead IV registers with Pearson annually and organises training using our support materials
- Internal Verifiers (IVs) check that assignments and assessment decisions are valid and that they meet our requirements. In a small team, all people will normally be assessors and IVs. No one can verify their own actions as an assessor
- assessors set or use assignments to assess learners to national standards.

Planning and record keeping

The Lead IV should make sure that there is a plan for assessment of the internally-assessed units and maintain records of assessment undertaken. The key records are:

- verification of assignment briefs
- learner authentication declarations
- assessor decisions on assignments, with feedback given to learners
- verification of assessment decisions.

Examples of records and further information are given in the *Pearson Guide to Quality Assurance*.

Effective organisation

Internal assessment needs to be well organised so that learners' progress can be tracked and so that we can monitor that assessment is being carried out in line with national standards. We support you through, for example, providing training materials and sample documentation. Our online myBTEC service can help support you in planning and record keeping. Further information on using myBTEC can be found in *Section 11 Resources and support* and on our website.

It is particularly important that you manage the overall assignment programme and deadlines to make sure that learners are able to complete assignments on time.

Learner preparation

To ensure that you provide effective assessment for your learners, you need to make sure that they understand their responsibilities for assessment and the centre's arrangements.

From induction onwards, you will want to ensure that learners are motivated to work consistently and independently to achieve the requirements of the qualification. Learners need to understand how assignments are used, the importance of meeting assignment deadlines and that all the work submitted for assessment must be their own.

You will need to give learners a guide that explains how assignments are used for assessment, how assignments relate to the teaching programme and how they should use and reference source materials, including what would constitute plagiarism. The guide should also set out your approach to operating assessment, such as how learners must submit work and request extensions.

You are encouraged to employ a range of formative assessment approaches before putting learners through to the assignments to formally assess the units. Formative assessment supports teaching and learning, and should be ongoing throughout the learning process. It enables tutors to enhance learning by giving learners constructive feedback so that they can identify their strengths and weaknesses, and to put measures in place to target areas that need work. Formative assessment approaches that incorporate reflective learning and regular skills assessment are important in encouraging self-development and reflective practice, to ensure that learners progress.

Setting assignments

An assignment is issued to learners as an assignment brief with a defined start date, a completion date and clear requirements for the evidence that they need to provide. This assignment will be separate from the practice and exploration activities that have been used during the learning period, and learners must understand that the assignment is being used to judge the learning aims. There may be specific, observed practical components during the assignment period. Assignments can be divided into tasks and may require several forms of evidence. A valid assignment will enable a clear and formal assessment outcome, based on the assessment criteria.

When setting your assignments, you need to work with the information given in the *Essential information for assessment decisions* and the *Assessment activity* sections of the units. You can choose to use the suggested scenarios or to adapt them to take account of local circumstances, provided that assignments are verified.

In designing your own assignment briefs you should bear in mind the following points.

- A learning aim must always be assessed as a whole and must not be spilt into two or more tasks.

- Assignments must be structured to allow learners to demonstrate the full range of achievement at all grade levels. Learners need to be treated fairly by being given the opportunity to achieve a higher grade if they have the ability.

- Learners should be given clear tasks, activities and structures for evidence; the criteria should not be given as tasks.

- You must ensure that assignments for synoptic assessment are designed to enable learners to draw on the specific units identified and demonstrate that they can identify and use effectively an appropriate selection of skills, techniques, concepts, theories and knowledge in an integrated way. Assignments for the synoptic unit will be monitored at programme level as part of the standards verification process to ensure that they encourage learners to select and apply their learning from across the qualification in an integrated way.

- Where there is a requirement for assessment to be conducted in the real work environment (mandatory work placement), assignments must be designed to facilitate this. Where there is no mandatory requirement for workplace assessment but learners will be in work placement or work experience settings as a part of the programme, then it would be worthwhile if these assignments were also designed for completion in the real work environment. You must ensure that the work placement or work experience setting gives learners the opportunity to achieve at all grade levels.

As assignments provide a final assessment, they will draw on the specified range of teaching content for the learning objective. The specified teaching content is compulsory. The evidence for assessment need not cover every aspect of the teaching content as learners will normally be given particular examples, case studies or contexts in their assignments. For example, if a learner is carrying out a practical performance, then they must address all the relevant range of content that applies in that instance.

An assignment brief should have:

- a vocational scenario or context that motivates the learner to apply their learning through the assignment

- an audience or purpose for which the evidence is being provided

- clear instructions to the learner about what they are required to do, normally set out through a series of tasks.

Forms of evidence

The units allow for a variety of forms of evidence to be used, provided that they are suited to the type of learning aim and the learner being assessed. For most units, the practical demonstration of skills is necessary. The units give you information on suitable forms of evidence that would give learners the opportunity to apply a range of transferable and sector skills. Centres may choose to use different suitable forms for evidence to those proposed. Overall, learners should be assessed using varied forms of evidence.

The main forms of evidence include:

- observation and recordings of practical tasks or performance in the workplace with supporting evidence

- projects

- recordings of role play, interviews and other types of simulated activity

- oral or written presentations with assessor questioning

- work logbooks and reflective journals.

It is important to note that an observation record is a source of evidence and does not confer an assessment decision. It must be sufficiently detailed to enable others to make a judgement about the quality and sufficiency of the performance and must document clearly the rationale for the assessment decision. Observation records should be accompanied by supporting evidence, which may take the form of videos, audio recordings, photographs, preparation notes, learner logs and other similar types of record.

The form(s) of evidence selected must allow:

- the learner to provide all the evidence required for the learning aim(s) and the associated assessment criteria at all grade levels
- the learner to produce evidence that is their own independent work
- a verifier to independently reassess the learner to check the assessor's decisions.

Centres need to take particular care in ensuring that learners produce independent work.

Making valid assessment decisions

Assessment decisions through applying unit-based criteria

Assessment decisions for this qualification are based on the specific criteria given in each unit and set at each grade level. The way in which individual units are written provides a balance of assessment of sector-specific knowledge, technical and practical skills, and transferable skills appropriate to the purpose of the qualification.

Pass, Merit and Distinction criteria all relate to individual learning aims. The assessment criteria for a unit are hierarchical and holistic where, in satisfying the M criteria, a learner would also have satisfied the P criteria. The unit assessment grid shows the relationships of the criteria so that assessors can apply all the criteria to the learner's evidence at the same time.

Assessors must show how they have reached their decisions using the criteria in the assessment records. When a learner has completed all the assessment for a unit then the assessment team will give a grade for the unit. This is given according to the highest level for which the learner is judged to have met all the criteria. Therefore:

- to achieve a Distinction, a learner must have satisfied all the Distinction criteria (and all the Pass and Merit criteria); these define outstanding performance across the unit as a whole
- to achieve a Merit, a learner must have satisfied all the Merit criteria (and all the Pass criteria) through high performance in each learning aim
- to achieve a Pass, a learner must have satisfied all the Pass criteria for the learning aims, showing coverage of the unit content and therefore attainment at Level 2 of the national framework.

The award of a Pass is a defined level of performance and cannot be given solely on the basis of a learner completing assignments. Learners who do not satisfy the Pass criteria should be reported as Unclassified.

Making assessment decisions using criteria

As an assessor, you review authenticated learner work and make judgements on standards using the assessment criteria and the supporting information provided in units and training materials. The evidence from a learner can be judged using all the relevant criteria at the same time. The assessor needs to make a judgement against each criterion that evidence is present and sufficiently comprehensive.

Assessors should use the following information and support in reaching assessment decisions:

- the Essential information for assessment decisions section in each unit
- your Lead IV and assessment team's collective experience, supported by the standardisation materials we provide.

Once the team has agreed the outcome, a formal assessment decision is recorded and reported to learners. The information given:

- must show the formal decision and indicate where criteria have been met
- may show where attainment against criteria has not been demonstrated
- avoid giving direct, specific instructions on how the learner can improve the evidence to achieve a higher grade.

Authenticity of learner work

Assessors must ensure that evidence is authentic to a learner through setting valid assignments and supervising them during the assessment period. Assessors must take care not to provide direct input, instructions or specific feedback that may compromise authenticity.

Once an assessment has begun, learners must not be given feedback that relates specifically to their evidence and how it can be improved, learners must work independently.

An assessor must assess only learner work that is authentic, i.e. learners' own independent work. Learners must authenticate the evidence that they provide for assessment through signing a declaration stating that it is their own work.

Assessors must complete a declaration that:

- the evidence submitted for this assignment is the learner's own
- the learner has clearly referenced any sources used in the work
- they understand that false declaration is a form of malpractice.

Centres can use Pearson templates or their own templates to document authentication.

During assessment, an assessor may suspect that some or all of the evidence from a learner is not authentic. The assessor must then take appropriate action using the centre's policies for malpractice. Further information is given in *Section 8 Administrative arrangements*.

Resubmission of improved evidence

An assignment provides the final assessment for the relevant learning aims and is normally a final assessment decision, except where the Lead IV approves one opportunity to resubmit improved evidence based on the completed assignment brief.

The Lead IV has the responsibility to make sure that resubmission is operated fairly. This means:

- checking that a learner can be reasonably expected to perform better through a second submission, for example that the learner has not performed as expected

- making sure that giving a further opportunity does not give an unfair advantage over other learners, for example through the opportunity to take account of feedback given to other learners

- checking that the learner will be able to provide improved evidence without further guidance and that the original evidence submitted remains valid.

Once an assessment decision has been given to the learner, the resubmission opportunity must have a deadline within 15 working days in the same academic year.

For assessment to be fair, it is important that learners are all assessed in the same way and that some learners are not advantaged by having additional time or the opportunity to learn from others. Therefore, learners who did not complete assignments by your planned deadline or an authorised extension deadline, if one was given for specific circumstances, may not have the opportunity to subsequently resubmit. Similarly, learners who submit work that is not their own should not be given an opportunity to resubmit.

The outcome of any resubmission of the assignment by the learner is then recorded as the final decision.

A learner who has not achieved their expected level of performance in the relevant learning aims **after resubmission** of an assignment may be offered a single retake opportunity using a new assignment. The highest grade that may be awarded is a Pass.

The Lead IV must authorise a retake with a new assignment only in exceptional circumstances and where it is necessary, appropriate and fair to do so. For further information on offering a retake opportunity you should refer to the *BTEC Centre Guide to Assessment* available on our website. We provide information on writing assignments for retakes on our website (please go to www.btec.co.uk/keydocuments).

7 External assessment

A summary of the type and availability of external assessment for this qualification is given below. This external assessment assesses a unit that is 25% of the total qualification GLH and is weighted to contribute the same proportion of the overall qualification grade.

See the units and sample assessment materials for more information.

Unit	Type	Availability
Unit 1: The Customer Service Environment	• Onscreen test set and marked by Pearson. • 75 minutes. • 60 marks.	On demand First assessment March 2018

For *Unit 1*, onscreen tests are available on demand starting from March 2018. These tests use a range of question types including examiner-marked. As tests have a full marking process, results for individual learners will be released once the process is complete and the time to issue results will vary.

Learners must be prepared for external assessment by the time they undertake it. In preparing learners for assessment, you will want to take account of required learning time and opportunities for resits. Learners who take an external assessment and who do not perform as expected may have one further opportunity using a later external assessment. Learners cannot take a further assessment until they have a result from the first assessment. Learners who attempt an external assessment twice will have the better of the grades achieved used in the final grade calculation for the qualification.

Units

The externally-assessed unit has a specific format, which we explain in *Section 3 Units*. The content of the unit will be sampled across external assessments over time through appropriate papers. The ways in which learners are assessed are shown through the assessment outcomes and grading descriptors.

Sample assessment materials

Each externally-assessed unit has a set of sample assessment materials (SAMs) that accompanies the specification. The SAMs are there to give you an example of what the external assessment will look like in terms of the feel and level of demand of the assessment.

The SAMs show the range of possible activity types that may appear in the actual assessments and give you a good indication of how the assessments will be structured. While SAMs can be used for practice with learners as with any assessment the content covered and specific details of the activities will vary in each assessment.

These sample assessments can be downloaded from our website.

Conducting external assessments

Centres must make arrangements for the secure delivery of external assessments. You need to ensure that learners are aware that they need to work independently and that they are aware of the requirements for any external assessment.

Each external assessment has a defined degree of control under which it must take place. We define degrees of control as follows.

High control

This is completion of assessment, usually over a longer period of time, which may include a period of controlled conditions. The controlled conditions may allow learners to access resources, prepared notes or the internet to help them complete the task. This applies to task-based assessments.

Further information on responsibilities for conducting external assessment is given in the document *Instructions for Conducting External Assessments*, available on our website.

8 Administrative arrangements

Introduction

This section focuses on the administrative requirements for delivering a BTEC qualification.
It will be of value to Quality Nominees, Lead IVs, Programme Leaders and Examinations Officers.

Learner registration and entry

Shortly after learners start the programme of learning, you need to make sure that they are registered for the qualification and that appropriate arrangements are made for internal and external assessment. You need to refer to our *Information Manual* for information on making registrations for the qualification and entries for external assessments.

Learners can be formally assessed only for a qualification on which they are registered. If learners' intended qualifications change, for example if a learner decides to choose a different pathway specialism, then the centre must transfer the learner appropriately.

Access to assessment

Both internal and external assessments need to be administered carefully to ensure that all learners are treated fairly and that results and certificates are issued on time to allow learners to progress to chosen progression opportunities.

Our equality policy requires that all learners have equal opportunity to access our qualifications and assessments, and that our qualifications are awarded in a way that is fair to every learner. We are committed to making sure that:

- learners with a protected characteristic (as defined by the Equality Act 2010) are not, when they are undertaking one of our qualifications, disadvantaged in comparison to learners who do not share that characteristic

- all learners achieve the recognition they deserve for undertaking a qualification and this achievement can be compared fairly to the achievement of their peers.

Further information on access arrangements can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational Qualifications*.

Administrative arrangements for internal assessment

Records

You are required to retain records of assessment for each learner. Records should include assessments taken, decisions reached and any adjustments or appeals. Further information can be found in our *Information Manual.* Records must be maintained as specified as we may ask to audit them.

Reasonable adjustments to assessment

To ensure that learners have fair access to demonstrate the requirements of the assessments, a reasonable adjustment is one that is made before a learner takes an assessment. You are able to make adjustments to internal assessments to take account of the needs of individual learners. In most cases, this can be achieved through a defined time extension or by adjusting the format of evidence. We can advise you if you are uncertain as to whether an adjustment is fair and reasonable. You need to plan for time to make adjustments if necessary.

Further details on how to make adjustments for learners with protected characteristics are given on our website in the document *Supplementary guidance for reasonable adjustment and special consideration in vocational internally assessed units*.

Special consideration

Special consideration is given after an assessment has taken place for learners who have been affected by adverse circumstances, such as illness. You must operate special consideration in line with our policy (see previous paragraph). You can provide special consideration related to the period of time given for evidence to be provided or for the format of the assessment if it is equally valid. You may not substitute alternative forms of evidence to that required in a unit or omit the application of any assessment criteria to judge attainment. Pearson can consider applications for special consideration only in line with the policy.

Appeals against assessment

Your centre must have a policy for dealing with appeals from learners. These appeals may relate to assessment decisions being incorrect or assessment being conducted unfairly. The first step in such a policy could be a consideration of the evidence by a Lead IV or other member of the programme team. The assessment plan should allow time for potential appeals after assessment decisions have been given to learners. If there is an appeal by a learner you must document the appeal and its resolution. Learners have a final right of appeal to Pearson but only if the procedures that you have put in place have not been followed. Further details are given in our policy *Enquiries and appeals about Pearson Vocational Qualifications*.

Administrative arrangements for external assessment

Entries and resits

For information on the timing of assessment and entries, please refer to the annual examinations timetable on our website. Learners are permitted to have one resit of an external assessment.

Access arrangements requests

Access arrangements are agreed with Pearson before an assessment. They allow learners with special educational needs, disabilities or temporary injuries to:

- access the assessment
- show what they know and can do without changing the demands of the assessment.

Access arrangements should always be processed at the time of registration. Learners will then know what type of arrangements are available in place for them.

Granting reasonable adjustments

For external assessment, a reasonable adjustment is one that we agree to make for an individual learner. A reasonable adjustment is defined for the individual learner and informed by the list of available access arrangements.

Whether an adjustment will be considered reasonable will depend on a number of factors to include the:

- needs of the learner with the disability
- effectiveness of the adjustment
- cost of the adjustment; and
- likely impact of the adjustment on the learner with the disability and other learners.

Adjustment may be judged unreasonable and not approved if it involves unreasonable costs, timeframes or affects the integrity of the assessment.

Special consideration requests

Special consideration is an adjustment made to a learner's mark or grade after an external assessment to reflect temporary injury, illness or other indisposition at the time of the assessment. An adjustment is made only if the impact on the learner is such that it is reasonably likely to have had a material effect on that learner being able to demonstrate attainment in the assessment.

Centres are required to notify us promptly of any learners who they believe have been adversely affected and request that we give special consideration. Further information can be found in the special requirements section on our website.

Dealing with malpractice in assessment

Malpractice means acts that undermine the integrity and validity of assessment, the certification of qualifications, and/or that may damage the authority of those responsible for delivering the assessment and certification.

Pearson does not tolerate actions (or attempted actions) of malpractice by learners, centre staff or centres in connection with Pearson qualifications. Pearson may impose penalties and/or sanctions on learners, centre staff or centres where incidents (or attempted incidents) of malpractice have been proven.

Malpractice may arise or be suspected in relation to any unit or type of assessment within the qualification. For further details regarding malpractice and advice on preventing malpractice by learners, please see Pearson's *Centre Guidance: Dealing with Malpractice*, available on our website.

The procedures we ask you to adopt vary between units that are internally assessed and those that are externally assessed.

Internally-assessed units

Centres are required to take steps to prevent malpractice and to investigate instances of suspected malpractice. Learners must be given information that explains what malpractice is for internal assessment and how suspected incidents will be dealt with by the centre. The *Centre Guidance: Dealing with Malpractice* document gives full information on the actions we expect you to take.

Pearson may conduct investigations if we believe that a centre is failing to conduct internal assessment according to our policies. The above document gives further information, examples and details the penalties and sanctions that may be imposed.

In the interests of learners and centre staff, centres need to respond effectively and openly to all requests relating to an investigation into an incident of suspected malpractice.

Externally-assessed units

External assessment means all aspects of units that are designated as external in this specification, including preparation for tasks and performance. For these assessments, centres must follow the JCQ procedures set out in the latest version of *JCQ Suspected Malpractice in Examinations and Assessments Policies and Procedures* (www.jcq.org.uk).

In the interests of learners and centre staff, centres need to respond effectively and openly to all requests relating to an investigation into an incident of suspected malpractice.

Learner malpractice

Heads of Centres are required to report incidents of any suspected learner malpractice that occur during Pearson external assessments. We ask that centres do so by completing a *JCQ Form M1* (available at www.jcq.org.uk/exams-office/malpractice) and emailing it and any accompanying documents (signed statements from the learner, invigilator, copies of evidence, etc.) to the Investigations Team at candidatemalpractice@pearson.com. The responsibility for determining appropriate sanctions or penalties to be imposed on learners lies with Pearson.

Learners must be informed at the earliest opportunity of the specific allegation and the centre's malpractice policy, including the right of appeal. Learners found guilty of malpractice may be disqualified from the qualification for which they have been entered with Pearson.

Teacher/centre malpractice

Heads of Centres are required to inform Pearson's Investigations Team of any incident of suspected malpractice by centre staff, before any investigation is undertaken. Heads of centres are requested to inform the Investigations Team by submitting a *JCQ Form M2(a)* (available at www.jcq.org.uk/exams-office/malpractice) with supporting documentation to pqsmalpractice@pearson.com. Where Pearson receives allegations of malpractice from other sources (for example Pearson staff or anonymous informants), the Investigations Team will conduct the investigation directly or may ask the head of centre to assist.

Incidents of maladministration (accidental errors in the delivery of Pearson qualifications that may affect the assessment of learners) should also be reported to the Investigations Team using the same method.

Heads of Centres/Principals/Chief Executive Officers or their nominees are required to inform learners and centre staff suspected of malpractice of their responsibilities and rights; see Section 6.15 of the *JCQ Suspected Malpractice in Examinations and Assessments Policies and Procedures* document.

Pearson reserves the right in cases of suspected malpractice to withhold the issuing of results and/or certificates while an investigation is in progress. Depending on the outcome of the investigation results and/or certificates may be released or withheld.

You should be aware that Pearson may need to suspend certification when undertaking investigations, audits and quality assurances processes. You will be notified within a reasonable period of time if this occurs.

Sanctions and appeals

Where malpractice is proven, we may impose sanctions or penalties.

Where learner malpractice is evidenced, penalties may be imposed such as:

- mark reduction for external assessments
- disqualification from the qualification
- being barred from registration for Pearson qualifications for a period of time.

If we are concerned about your centre's quality procedures, we may impose sanctions such as:

- working with you to create an improvement action plan
- requiring staff members to receive further training
- placing temporary blocks on your certificates
- placing temporary blocks on registration of learners
- debarring staff members or the centre from delivering Pearson qualifications
- suspending or withdrawing centre approval status.

The centre will be notified if any of these apply.

Pearson has established procedures for centres that are considering appeals against penalties and sanctions arising from malpractice. Appeals against a decision made by Pearson will normally be accepted only from eads of centres (on behalf of learners and/or members or staff) and from individual members (in respect of a decision taken against them personally). Further information on appeals can be found in our *Enquiries and Appeals* policy, which is on our website. In the initial stage of any aspect of malpractice, please notify the Investigations Team by email via pqsmalpractice@pearson.com who will inform you of the next steps.

Certification and results

Once a learner has completed all the required units for a qualification, even if final results for external assessments have not been issued, then the centre can claim certification for the learner, provided that quality assurance has been successfully completed. For the relevant procedures please refer to our *Information Manual*. You can use the information provided on qualification grading to check overall qualification grades.

Results issue

Results for external assessment will be issued once marking is complete.

Qualification results will be issued once a learner has completed all components of the qualification and you have claimed certification. The result will be in the form of a grade. You should be prepared to discuss performance with learners, making use of the information we provide and post-results services.

Post-assessment services

Once results for external assessments are issued, you may find that the learner has failed to achieve the qualification or to attain an anticipated grade. It is possible to transfer or reopen registration in some circumstances. Our *Information Manual* gives further information.

Changes to qualification requests

Where a learner who has taken a qualification wants to resit an externally-assessed unit to improve their qualification grade, you firstly need to decline their overall qualification grade. You must decline the grade before the certificate is issued. For a learner receiving their results in August, you should decline the grade by the end of September if the learner intends to resit an external assessment.

Additional documents to support centre administration

As an approved centre, you must ensure that all staff delivering, assessing and administering the qualifications have access to this documentation. These documents are reviewed annually and are reissued if updates are required.

- *Pearson Quality Assurance Handbook*: this sets out how we will carry out quality assurance of standards and how you need to work with us to achieve successful outcomes.
- *Information Manual*: this gives procedures for registering learners for qualifications, transferring registrations, entering for external assessments and claiming certificates.
- *Lead Examiners' Reports*: these are produced after each series for each external assessment and give feedback on the overall performance of learners in response to tasks or questions set.
- *Instructions for the Conduct of External Assessments*: explains our requirements for the effective administration of external assessments, such as invigilation and submission of materials.
- Regulatory policies: our regulatory policies are integral to our approach and explain how we meet internal and regulatory requirements. We review the regulated policies annually to ensure that they remain fit for purpose. Policies related to this qualification include:
  - adjustments for candidates with disabilities and learning difficulties, access arrangements and reasonable adjustments for general and vocational qualifications
  - age of learners
  - centre guidance for dealing with malpractice
  - recognition of prior learning and process.

This list is not exhaustive and a full list of our regulatory policies can be found on our website.

9 Quality assurance

Centre and qualification approval

As part of the approval process, your centre must make sure that the resource requirements listed below are in place before offering the qualification.

- Centres must have appropriate physical resources (for example, equipment, IT, learning materials, teaching rooms) to support the delivery and assessment of the qualification.
- Staff involved in the assessment process must have relevant expertise and/or occupational experience.
- There must be systems in place to ensure continuing professional development for staff delivering the qualification.
- Centres must have in place appropriate health and safety policies relating to the use of equipment by learners.
- Centres must deliver the qualification in accordance with current equality legislation.
- Centres should refer to the teacher guidance section in individual units to check for any specific resources required.

Continuing quality assurance and standards verification

On an annual basis, we produce the *Pearson Quality Assurance Handbook*. It contains detailed guidance on the quality processes required to underpin robust assessment, internal verification and planning of appropriate employer involvement.

The key principles of quality assurance are that:

- a centre delivering BTEC programmes must be an approved centre, and must have approval for the programmes or groups of programmes that it is delivering
- the centre agrees, as part of gaining approval, to abide by specific terms and conditions around the effective delivery and quality assurance of assessment; it must abide by these conditions throughout the period of delivery
- Pearson makes available to approved centres a range of materials and opportunities, through online standardisation, intended to exemplify the processes required for effective assessment, and examples of effective standards. Approved centres must use the materials and services to ensure that all staff delivering BTEC qualifications keep up to date with the guidance on assessment
- an approved centre must follow agreed protocols for standardisation of assessors and verifiers, for the planning, monitoring and recording of assessment processes, and for dealing with special circumstances, appeals and malpractice.

The approach of quality-assured assessment is through a partnership between an approved centre and Pearson. We will make sure that each centre follows best practice and employs appropriate technology to support quality-assurance processes, where practicable. We work to support centres and seek to make sure that our quality-assurance processes do not place undue bureaucratic processes on centres. We monitor and support centres in the effective operation of assessment and quality assurance.

The methods we use to do this for BTEC Technical Certificate and Diploma qualifications include:

- making sure that all centres complete appropriate declarations at the time of approval
- undertaking approval visits to centres
- making sure that centres have effective teams of assessors and verifiers who are trained to undertake assessment
- undertaking an overarching review and assessment of a centre's strategy for ensuring sufficient and appropriate engagement with employers at the beginning of delivery of any BTEC programme(s)
- undertaking a review of the employer involvement planned at programme level to ensure its appropriateness at a time when additional activities can be scheduled where necessary
- assessment sampling and verification, through requested samples of assessments, completed assessed learner work and associated documentation
- an overarching review and assessment of a centre's strategy for delivering and quality assuring its BTEC programmes.

Centres that do not fully address and maintain rigorous approaches to delivering, assessing and quality assurance cannot seek certification for individual programmes or for the BTEC Technical Certificate and Diploma qualifications. An approved centre must make certification claims only when authorised by us and strictly in accordance with requirements for reporting.

Centres that do not comply with remedial action plans may have their approval to deliver qualifications removed.

10 Understanding the qualification grade

Awarding and reporting for the qualification

This section explains the rules that we apply in providing an overall qualification grade for each learner. The final grade awarded for a qualification represents a holistic performance across all of the qualification. As the qualification grade is an aggregate of the total performance, there is some element of compensation in that a higher performance in some units will be balanced by a lower outcome in others.

Eligibility for an award

In order to be awarded the qualification, a learner must complete all units and achieve a Pass or above in all units. See *Section 2 Structure* for full details.

To achieve the qualification grade, learners must:

- achieve and **report a grade** (D, M or P) for all units within a valid combination
- achieve the **minimum number of points** at a grade threshold.

Where there are optional units in a qualification, it is the responsibility of the centre to ensure that a correct unit combination is adhered to. Learners who do not pass all the required units shown in the structure will not achieve the qualification. For example, learners who have not passed the required external units or who have not taken enough mandatory will not achieve that qualification even if they have enough points.

Calculation of the qualification grade

The final grade awarded for a qualification represents an aggregation of a learner's performance across the qualification. As the qualification grade is an aggregate of the total performance, there is some element of compensation in that a higher performance in some units may be balanced by a lower outcome in others.

In the event that a learner achieves more than the required number of optional units (where available), the mandatory units along with the optional units with the highest grades will be used to calculate the overall result, subject to the eligibility requirements for that particular qualification title.

The qualification is awarded at the grade ranges shown in the table below.

Qualification	Available grade range
Certificate	P to D

The *Calculation of qualification grade* table, shown further on in this section, shows the minimum thresholds for calculating these grades. The table will be kept under review over the lifetime of the qualification. The most up to date table will be issued on our website.

Pearson will monitor the qualification standard and reserves the right to make appropriate adjustments.

Learners who do not meet the minimum requirements for a qualification grade to be awarded will be recorded as Unclassified (U) and will not be certificated. They may receive a Notification of Performance for individual units. Our *Information Manual* gives full details.

Points available for internal units

The table below shows the number of **points** available for internal units. For each internal unit, points are allocated depending on the grade awarded.

	Unit size
	60 GLH
U	0
Pass	16
Merit	24
Distinction	32

Points available for the external unit

Raw marks from the external unit will be awarded **points** based on performance in the assessment. The points scores available for the external unit at grade boundaries areas follows.

	Unit size
	60 GLH
U	0
Pass	16
Merit	24
Distinction	32

We will automatically calculate the points for the external unit once the external assessment has been marked and grade boundaries have been set. For more details about how we set grade boundaries in the external assessment please go to our website.

Claiming the qualification grade

Subject to eligibility, we will automatically calculate the qualification grade for your learners when the internal unit grades are submitted and the qualification claim is made. Learners will be awarded qualification grades for achieving the sufficient number of points within the ranges shown in the relevant calculation of qualification grade table for the cohort.

Calculation of qualification grade table

Certificate	
Grade	**Points threshold**
P	64
M	88
D	112

The table is subject to review over the lifetime of the qualification.

The most up-to-date version will be issued on our website.

Examples of grade calculations based on table applicable to registrations from September 2017

Example 1: Achievement of a Certificate with a P grade

Unit	GLH	Type	Grade	Points
1	60	External	Pass	16
2	60	Internal	Pass	16
3	60	Internal	Pass	16
4	60	Internal	Pass	16
	240		P	64

The learner has achieved a Pass or above in all units.

The learner has sufficient points for a P grade.

Example 2: Achievement of a Certificate with a D grade

Unit	GLH	Type	Grade	Points
1	60	External	Merit	24
2	60	Internal	Distinction	32
3	60	Internal	Distinction	32
4	60	Internal	Distinction	32
	240		D	122

The learner has sufficient points for a D grade.

Example 3: Achievement of a Certificate with an Unclassified result

Unit	GLH	Type	Grade	Points
1	60	External	Merit	24
2	60	Internal	Distinction	32
3	60	Internal	Unclassified	0
4	60	Internal	Distinction	32
	240		U	88

The learner has a U in Unit 3.

The learner has sufficient points for a M but has not met the requirement for a Pass, or above, in all Units.

11 Resources and support

Our aim is to give you support to enable you to deliver Pearson BTEC Level 2 Technicals with confidence. You will find resources to support teaching and learning, assessing, and professional development on our website.

Support for setting up your course and preparing to teach

Schemes of Learning

Our free Schemes of Learning give you suggestions and ideas for how to deliver the units in the qualifications, including opportunities to develop employability skills, tips on embedding mathematics and English, and how to link units through holistic assessments.

Delivery planner

High-level models showing how the course can be delivered over different timescales, for example six months, one year, two years.

myBTEC

myBTEC is a free, online toolkit that lets you plan and manage your BTEC provision from one place. It supports the delivery, assessment and quality assurance of BTEC qualifications in centres and supports teachers with the following activities:

- checking that a programme is using a valid combination of units
- creating and verifying assignment briefs (including access to a bank of assignment briefs that can be customised)
- creating assessment plans and recording assessment decisions
- tracking the progress of every learner throughout their programme.

To find out more about myBTEC, visit the myBTEC page on the support services section of our website.

Support for teaching and learning

Work Experience Toolkit

Our free Work Experience Toolkit gives guidance for tutors, assessors, work-based supervisors and learners on how to make the most of work placements and work experience.

Pearson Learning Services provides a range of engaging resources to support BTEC qualifications.

Teaching and learning resources may also be available from a number of other publishers. Details of Pearson's own resources and of all endorsed resources are on our website.

Support for assessment

Sample assessment materials for externally-assessed units

Sample assessment materials (SAMs) are available for externally-assessed units and can be downloaded from the Pearson Qualifications website. An additional set of sample assessment materials for externally-assessed units will also be available, giving your learners further opportunities for practice.

Sample assessment materials for internally-assessed units

We do not prescribe the assessments for the internally-assessed units. Rather, we allow you to set your own, according to your learners' preferences.

We provide assignment briefs approved by Pearson Standards Verifiers.

Sample marked learner work

To support you in understanding the expectation of the standard at each grade, examples of sample marked learner work will be made available on our website.

Training and support from Pearson

People to talk to

There are lots of people who can support you and give you advice and guidance on delivering your Pearson BTEC Level 2 Technicals. They include the following.

- Standards Verifiers – they can support you with preparing your assignments, ensuring that your assessment plan is set up correctly, in preparing learner work and providing quality assurance through sampling.

- Subject Advisors – available for all sectors. They understand all Pearson qualifications in their sector and so can answer sector-specific queries on planning, teaching, learning and assessment.

- Curriculum Development Managers (CDMs) – they are regionally based and have a full overview of BTEC qualifications and of the support and resources that Pearson provides. CDMs often run network events.

- Customer Services – the 'Support for You' section of our website gives the different ways in which you can contact us for general queries. For specific queries, our service operators can direct you to the relevant person or department.

Training and professional development

We provide a range of training and professional development events to support the introduction, delivery, assessment and administration of the Pearson BTEC Level 2 Technicals.

These sector-specific events, developed and delivered by specialists, are available both face to face and online.

BTEC Level 2 Technical Certificate in
CUSTOMER SERVICE OPERATIONS

Like what you see?

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All this and more at: quals.pearson.com/btecL2techCSO

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