

BTEC Level 2 Technical Certificate in Customer Service Operations: sample delivery plan

Introduction

This document is aimed at supporting tutors and those delivering BTEC Level 2 Technical qualifications from September 2017. Clear unit planning and understanding of key deadlines are essential for a successful delivery programme. We have produced two sample delivery plans showing how the BTEC Level 2 Technical Certificate in Customer Service Operations could be delivered over 6 or 12 months, highlighting assessment milestones and indicating where you can teach units holistically.

Overview of course delivery and assessment

The **BTEC Level 2 Technical Certificate in Customer Service Operations** has 240 GLH and the TQT (total qualification time) is 360 hours. It consists of four mandatory units.

Involving employers in the assessment/delivery

Employer involvement in the delivery and/or assessment of technical qualifications is essential. You will need to supply evidence of how you have provided opportunities for all your learners to undertake meaningful activity involving employers. 'Meaningful activity' could include the following suggestions:

- Structured work experience or work placements: in Unit 2, learners could undertake a placement delivering customer service in a face-to-face environment in a local business. Where this is not feasible, simulation will need to be used. In addition, it is strongly recommended that learners take part in work experience in a customer service environment in order to develop the necessary skills for Unit 3. Again, where this is not feasible or insufficient for all assessment, simulations can be used, however, employers must be involved in simulations. Additionally, in Unit 4, learners would benefit from suitable work experience. Again, if this is not feasible, simulations can be used.
- Projects, exercises, tasks or assessments set with input from industry practitioners: employers could be asked to be involved in the assessment or to provide assessment materials such as customer service information for Units 2 and 3, and customer feedback data for learners to interpret in Unit 4.
- Units delivered or co-delivered by an industry practitioner, e.g. masterclasses or guest lectures: employers could run masterclasses on how to use communication skills to provide customer service to customers with special requirements and needs, including disabilities and/or key points of the Consumer Rights Act 2015 for Unit 2.
- Industry practitioners operating as expert witnesses, contributing to the assessment of a learner's work in suitable work experience placements in Units 2, 3 and 4.
- Visits to local businesses to initially understand the customer service environment for Unit 1.

For this qualification, employer involvement should be from suitable work experience placements in customer service situations. Centres are encouraged to make contact with appropriate businesses, as work experience is pivotal to learners' success in this qualification. Where this is not feasible, simulation can be used; however, employers must be involved in simulations, for example through being involved in assessment or by providing assessment materials such as the provision of customer service information and customer feedback data for learners to interpret. Building strong links with these individuals will be integral to the integration of meaningful employer involvement within units. The qualification specification should be referred to for details of suggested employer involvement in each unit. The following units have suggestions for employer involvement either in the delivery or assessment:

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

Which units are externally assessed?

Unit 1 is externally assessed. Assessment for this unit takes the form of an onscreen test, available on demand, with the first assessment in January 2018.

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.

Internally assessed units

Units 2, 3 and 4 are assessed through assignments set and marked by the centre. The assessment allows learners to apply and develop their customer service skills through experiential learning. This requires them to engage in delivering customer service in both a face-to-face and a digital environment, and to understand how customer service operations can be improved. Learners are therefore able to develop underpinning knowledge and understanding in this unit.

In *Unit 2: Delivering Customer Service Face to Face* and *Unit 3: Delivering Digital Customer Service*, learners apply technical knowledge and demonstrate their practical abilities to deliver customer service appropriately in a variety of situations.

The skills and knowledge gained in this qualification are drawn together in the synoptic unit: *Unit 4: Improving Customer Service*. It is designed to take place towards the end of the programme and draws upon the learning throughout. It takes the form of an investigative and practical task, where learners review how a specific organisation has collected and used customer feedback, in order to make continuous improvements and 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.

Induction

Centres are encouraged to timetable a period of induction for learners at the start of the programme. This should include information on topics such as the structure of the units, how to use an assignment brief, the importance of command words, how to work to meet deadlines, the consequences of not meeting deadlines, how to reference work and the importance of evidence submitted for assessment being independently produced, valid and authentic. Centre policies on malpractice and plagiarism should be explained.

This document focusses on providing key dates to plan around and examples of how your course delivery could be structured, as set out in the sections below.

Section 1: Sample delivery plan – 12-month model

- A chart setting out key deliverables over a 12-month period (2 semesters)
- Tables showing week-by-week delivery breakdown
- Rationale for the suggested plan

Section 2: Sample delivery plan – 6-month model

- A chart setting out key deliverables over a 6-month period (1 semester with 2 x 12-week teaching blocks)
- Tables showing week-by-week delivery breakdown
- Rationale for the suggested plan

Further support can be found within the relevant specification on our website:

<https://qualifications.pearson.com/content/dam/pdf/BTEC%20Technicals/customer-service-operations/2017/specification-and-sample-assessments/pearson-btec-l2-tech-cert-customer-service.pdf>

SECTION 1: Sample 12-month delivery plan

This plan shows how you could deliver the teaching and learning over two semesters (12 months). It is intended as guidance and is not the only possible model. You can adapt it to suit your local needs.

	SEMESTER 1		SEMESTER 2		TOTAL HOURS (GLH IN CLASSROOM)
	Unit no.	Classroom hours	Unit no.	Classroom hours	
	2	60	3	60	120
	1	60	4	60	120
	Total hours (GL and non-GL)	GL: 120 Non-GL: 60	Total hours (GL and non-GL)	GL: 120 Non-GL: 60	
TOTAL HOURS PER SEMESTER		180		180	
PER WEEK (18-week semester)		10 (inc non-GL)		10 (inc non-GL)	

Week-by-week breakdown over 12 months

Key

R	Revision for external assessment	LA	Learning aim
EXT	External assessment	WP	Work placement
SA	Summative assessment	IND	Induction

SEMESTER 1

	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9
Unit 2	IND	LAA1	LAA2	LAA3	LAA4	LAA5	LAB1	LAB2	LAB3
Unit 1	IND	LAA1 LAA2 LAA3	LAA1 LAA2 LAA3	R	LAB1 LAB2	LAB1 LAB2	LAB3	LAB4	LAB5 LAB6

SEMESTER 1 (CONT.)

	Week 10	Week 11	Week 12	Week 13	Week 14	Week 15	Week 16	Week 17	Week 18
Unit 2	LAB4	LAB5	LAB5	WP	WP	LAC1	LAC2	SA	SA
Unit 1	R	LAC1 LAC3	LAC4 LAC5 LAC2	R	LAD1 LAD2	LAD3 LAD4	R	R	EXT

Key

R	Revision for external assessment	LA	Learning aim
EXT	External assessment	WP	Work placement
SA	Summative assessment	IND	Induction

SEMESTER 2

	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9
Unit 3	IND	LAA1	LAA1	LAA2	LAA2	LAB1	LAB1	LAB2	LAB2
Unit 4	IND	LAA1	LAA1	LAA2	LAA3	LAB1	LAB1	LAB2	LAB3

	Week 10	Week 11	Week 12	Week 13	Week 14	Week 15	Week 16	Week 17	Week 18
Unit 3	LAB3	LAB3	LAC1	LAC2	LAC2	WP	WP	SA	SA
Unit 4	LAB3	SA	SA	LAC1	LAC1	LAC2	LAC2	SA	SA

Sample 12-month plan – Rationale

General assumptions that have been made are as follows:

- Most delivery centres for this post-16 qualification deliver qualifications over a 36-week academic year, with the year separated into two semesters.
- Semester 2 includes an induction week (for those centres that are intending to operate with a twice yearly intake).

Suggested units for Semester 1: Units 2 and 1

You should consider delivering Units 1 and 2 in Semester 1. Unit 2 provides underpinning knowledge for Unit 1, and indeed Units 3 and 4. Studying Unit 1 (the externally assessed unit) towards the start of the programme ensures that the concepts can be reinforced through activities in other units, embedding the learning and still allowing time for learners to sit the assessment twice if necessary.

Units 2 and 3 are practical, work experience-related units where learners need to demonstrate their practical abilities in a face-to-face and digital customer service environment. These units must be delivered prior to Unit 4. It is recommended that Unit 2 is completed prior to Unit 3: learners are perhaps more familiar with face-to-face customer service situations as opposed to digital, and may therefore find this content easier to access in Semester 1. It is also recommended that Unit 1 is delivered in Semester 1, in order to allow time for a resit opportunity if necessary.

Delivering Unit 2:

- Straightforward delivery in line with, and in order of, specification content.
- Assessment has been mapped, with time allowed for research as well as for developing the assignment evidence.
- Assessment and work experience time has been allowed at the end of the unit. It is suggested that the summative assessments all take place at the end of the unit, at the same time as the work placement and following the work placement, as the evidence from this forms the majority of the assessment for this unit. It has been assumed that learners will be able to go on a work placement for two weeks within the semester.
- Learning aim B5 has been allocated more time than other elements of the unit content, due to centres potentially wanting to simulate these challenges. Planning this simulation so that all learners can participate may therefore require more time.
- Work placement has been sited between Learning aims B and C, as Learning aim C is a review of their skills and the use of feedback. Therefore, the delivery of this is deemed to be more appropriate following the placement.

Delivering Unit 1:

- The suggested approach for this unit is to work through the content in the order it appears in the specification.
- On completion of each learning outcome, a revision week has been mapped to enable learners to revise the topic before moving to the next.

- An additional revision session for the whole unit has been included prior to external assessment.
- Some elements of the unit content have been combined in weeks. This is due to the amount of content to be covered as per the unit content in the specification.
- Learning aim C2 follows the other content from Learning aim C, as this is generic health and safety legislation, whereas other legislation in this learning aim is specifically related to customer service provision.

Suggested units for Semester 2: Units 3 and 4

Units 3 and 4 are recommended for Semester 2, so that learners have already had time to experience customer service in a face-to-face environment. This then culminates in the synoptic Unit 4, which draws together all of their knowledge, skills and experience in improving customer service.

Delivering Unit 3:

- Straightforward delivery in line with, and in order of, specification content.
- Assessment has been mapped, with time allowed for research as well as for developing the assignment evidence.
- Assessment and work experience time has been allowed at the end of the unit. It is suggested that the summative assessments all take place at the end of the unit, at the same time as the work placement and following the work placement, as the evidence from this forms the majority of the assessment for this unit. It has been assumed that learners will be able to go on a work placement for two weeks within the semester.
- Learning aim C1 has been allocated more time than other elements of the unit content, due to centres potentially wanting to simulate the writing of emails to customers to ensure effective spelling, punctuation and grammar and the appropriateness of responses. There would also be an opportunity for learners to assess each other's emails. More time has therefore been allocated, in order for all learners to participate.

Delivering Unit 4:

- Straightforward delivery in line with, and in order of, specification content.
- Learners must be encouraged to gain the necessary data and knowledge of procedures during their work placements in Units 2 and 3, to help inform their summative assessments in this unit. A suitable work placement for this unit would be ideal; however, if this is not feasible, the relevant data from their work placement can be used for the assessment process.
- Learning aims A1, B1 and B3 and Learning aim C have been allocated more time, due to the amount of knowledge coverage necessary as per the unit content.
- Summative assessment time has been built in after Learning aims A and B and then following Learning aim C. This follows the suggested assessment evidence as per the specification.

SECTION 2: Sample 6-month delivery plan

This plan shows how you could deliver the teaching, learning and assessment over one semester consisting of two 12-week blocks. This allows you to accommodate learners who may have begun other programmes but decide to change midway through the year. As a 24-week programme, this could be started after Christmas and completed in the summer in time to progress to level 3 at the start of the following academic year.

It is intended as guidance and is not the only possible model. You can adapt it to suit your local needs.

	BLOCK 1: Weeks 1–12		BLOCK 2: Weeks 13–24		TOTAL HOURS (GLH IN CLASSROOM)
	Unit no.	Classroom hours	Unit no.	Classroom hours	
	2	60	3	60	120
	1	60	4	60	120
	Total hours (GL and non-GL)	GL: 120 Non-GL: 60	Total hours (GL and non-GL)	GL: 120 Non-GL: 60	
TOTAL HOURS PER TEACHING BLOCK		180		180	
PER WEEK (12-week block)		15		15	

Week-by-week breakdown over 6 months

Key

R	Revision for external assessment	LA	Learning aim
EXT	External assessment	WP	Work placement
SA	Summative assessment	IND	Induction

BLOCK 1

	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12
Unit 2	IND	LAA1 LAA2	LAA3 LAA4	LAA5 LAB1	LAB2 LAB3	LAB4 LAB5	LAB5 LAB5	WP	WP	LAC1	LAC2	SA
Unit 1	LAA1 LAA2 LAA3	R	LAB1 LAB2 LAB3	LAB4 LAB5 LAB6	R	LAC1 LAC3 LAC4	LAC5 LAC2	R	LAD1 LAD2 LAD3 LAD4	R	R	EXT

BLOCK 2

	Week 13	Week 14	Week 15	Week 16	Week 17	Week 18	Week 19	Week 20	Week 21	Week 22	Week 23	Week 24
Unit 3	IND	LAA1	LAA2	LAB1	LAB2	LAB3	LAC1	LAC1	LAC2	WP	WP	SA
Unit 4	IND	LAA1	LAA2 LAA3	LAB1	LAB1 LAB2	LAB2 LAB3	LAB3	SA	LAC1	LAC1 LAC2	LAC2	SA

Sample 6-month plan – Rationale

General assumptions that have been made are as follows:

- Centres may be seeking to start programmes later in the year and run them over a shorter period to accommodate learners leaving other programmes around Christmas (prior to the ILR and therefore in time to start something new in January).
- No induction week has been included in the externally assessed unit (Unit 1).

Suggested units for Block 1 delivery: Units 2 and 1

You should still consider delivering Units 2 and 1 in Block 1 (for rationale – see 12-month plan).

As there are more hours per week recommended for this shorter programme, some weeks contain more than one learning outcome.

Delivering Unit 2:

- Straightforward delivery in line with, and in order of, specification content.
- Assessment has been mapped, with time allowed for research as well as for developing the assignment evidence.
- Assessment and work experience time has been allowed at the end of the unit. It is suggested that the summative assessment all take place at the end of the unit, at the same time as the work placement and following the work placement, as the evidence from this forms the majority of the assessment for this unit. It has been assumed that learners will be able to go on a work placement for two weeks within the block.
- Learning aim B5 has been allocated more time than other elements of the unit content, due to centres potentially wanting to simulate these challenges. Planning this simulation so that all learners can participate may therefore require more time.
- Work placement has been sited between Learning aims B and C, as Learning aim C is a review of their skills and the use of feedback. Therefore, the delivery of this is deemed to be more appropriate following the placement.

Delivering Unit 1:

- The suggested approach for this unit is to work through the content in the order it appears in the specification.
- On completion of each learning outcome, a revision week has been mapped to enable learners to revise the topic before moving to the next.
- An additional revision session for the whole unit has been included prior to external assessment.
- Some elements of the unit content have been combined in weeks. This is due to the amount of content to be covered as per the unit content in the specification.
- Learning aim C2 has been placed following the other content from Learning aim C, as this is generic health and safety legislation, whereas other legislation in this learning aim is specifically related to customer service provision.

Suggested units for Block 2 delivery: Units 3 and 4

Units 3 and 4 are also recommended for Block 2 (for rationale – see 12-month plan).

Units 3 and 4 are recommended for Block 2, so that learners have already had time to experience customer service in a face-to-face environment. This then culminates in the synoptic Unit 4, which draws together all of their knowledge, skills and experience in improving customer service.

Delivering Unit 3:

- Straightforward delivery in line with, and in order of, specification content.
- Assessment has been mapped, with time allowed for research as well as for developing the assignment evidence.
- Assessment and work experience time has been allowed at the end of the unit. It is suggested that the summative assessment all take place at the end of the unit, at the same time as the work placement and following the work placement, as the evidence from this forms the majority of the assessment for this unit. It has been assumed that learners will be able to go on a work placement for two weeks within the block.
- Learning aim C1 has been allocated more time than other elements of the unit content, due to centres potentially wanting to simulate the writing of emails to customers to ensure effective spelling, punctuation and grammar and the appropriateness of responses. There would also be an opportunity for learners to assess each other's emails. More time has therefore been allocated, in order for all learners to participate.

Delivering Unit 4:

- Straightforward delivery in line with, and in order of, specification content.
- Learners must be encouraged to gain the necessary data and knowledge of procedures during their work placements in Units 2 and 3 to help inform their summative assessments in this unit. A suitable work placement for this unit would be ideal; however, if this is not feasible, the relevant data from their work placement can be used for the assessment process.
- Learning aims B1 and B3 and Learning aim C have been allocated more time due to the amount of knowledge coverage necessary as per the unit content.
- Summative assessment time has been built in after Learning aims A and B and then following Learning aim C. This follows the suggested assessment evidence as per the specification.