



Unit 14: Investigating Customer Service

Delivery guidance

Approaching the unit

This is a practical unit that allows your learners the opportunity to investigate the role that customer service plays in the success of a business. Learners will develop a sound understanding of the importance of building relationships with customers through identifying needs and expectations, and the impact of current legislation and regulations on customer service provision. Learners will also need to develop communication and interpersonal skills and demonstrate effective customer service delivery in different situations. Allow opportunities for learners to engage with the service industry to investigate how the customer experience could be improved through monitoring and evaluation of the provision.

You could develop links with local retail businesses for visits and guest speakers. Some learners may have part-time employment working in retail outlets, supermarkets or restaurants, and these experiences could be shared from both perspectives as a customer and deliverer of customer service.

You could use a range of delivery methods in this unit, such as:

- discussions – class and small group discussions on customer experiences
- individual or group presentations – covering customer service roles and different approaches in a range of businesses
- case studies illustrating improvements to customer service through monitoring and evaluation
- video clips on communication skills and handling difficult customer service situations.

Group work is also an acceptable form of delivery but you must ensure that each learner produces their own evidence that is sufficient for assessment.

You can involve local employers in the delivery of this unit by inviting them as:

- guest speakers and interview opportunities
- audience members for learner presentations, who can provide feedback
- providers of work experience for learners, and of business materials as basis for case studies and exemplars
- providers of opportunities for learners to visit and see customer service in action.

Delivering the learning aims

For learning aim A you could introduce the topic by having learners share experiences of good and poor customer service both as a customer and from any work experience. Learners could reflect on what happened, how they dealt with it, and how they felt about the outcome. It is important for learners to recognise how delivering excellent customer service leads to business success, and the

costs to the business if poor service is given. You could then give initial input on the importance of delivering excellent customer service and how this relates to business success. In small groups, your learners could then carry out research on the variety of customer service roles, and the range of skills required for different industries such as hospitality or retail.

It is important that learners understand the relevant current legislation and regulations relating to customer service delivery and the implications of non-compliance. The law changes and is updated continuously. Centres are always advised to use the most up-to-date law whenever possible, but it is appreciated that sometimes laws change during/after delivery to learners.

The use of a visiting speaker could help learners understand how a business meets the needs and expectations of different types of customers.

To deliver learning aim B, teaching and learning should focus on how to make improvements to customer service provision through feedback, and the indicators to measure improved performance. You could invite guest speakers from local and national businesses to present and lead discussions on the different methods used to monitor and evaluate customer service in order to improve provision.

Alternatively, learners could visit or carry out secondary website research on the methods used in, for example, large retail outlets, supermarkets or call centres. Learners should design a suitable questionnaire to gather and evaluate data, and this will help them examine the benefits of improvements for the business, the customer and the employee.

Learners may also be able to gather information from work experience placements or part-time jobs.

For learning aim C, you could give initial input on different types of problems and complaints, leading discussions on ways to deal with these and giving solutions. Video clips could be used to illustrate appropriate behaviours, communication and interpersonal skills, and you should allow plenty of opportunities for scenario-based role-play activities for learners to practise skills for dealing with requests and complaints. These activities could include face-to-face situations, telephone scenarios or written exchanges using email or letters. This will enable learners to reflect on their performance and identify areas for skills development.



Learning aim	Key content areas	Recommended assessment approach
A Explore how effective customer service contributes to business success	A1 Customer service in business A2 Customer expectations and satisfaction A3 Benefits of building customer relationships A4 Customer service legislation and regulations	A report examining the customer service provision process in a business and the value of delivering excellent customer service to support business success. Prepare a training handbook for a selected business on customer service, including relevant legislation and regulations.
B Investigate the methods used to improve customer service in a business	B1 Monitoring and evaluating customer service provision B2 Indicators in improved performance	The report should also include three monitoring methods used to review the customer service provision and should draw on quantitative and qualitative data.
C Demonstrate customer service in different situations, using appropriate behaviours to meet expectations	C1 Customer service skills and behaviours C2 Dealing with customer service requests and complaints C3 Individual skills audit and development plan	Demonstration of customer service skills in at least three different business situations. Focus on demonstration of product/service knowledge when dealing with customers' queries, requests and problems. An evaluation of skills is also included.

Assessment guidance

This unit is internally assessed through two assignments. The first covers learning aims A and B, and the second covers learning aim C.

All learners must independently generate individual evidence that can be authenticated. The main sources of evidence are likely to be written reports and records confirming demonstration of skills in three different situations, which should include handling complaints and difficult customers. To meet the criteria for learning aims A and B, learners will need to prepare a report that investigates the approaches to customer service delivery in a selected business, using examples from the business to illustrate this. They could prepare a training handbook for new staff to include guidance on customer service legislation and regulations, and how improvements to customer service provision are managed.

For learning aim C, most tutors will find that role play or work experience are the most appropriate modes of delivery. This, however, must be supported with a tutor observation report and personal statement, as well as peer assessment and witness statements from colleagues. The assessment should cover handling complaints and difficult customers. Learners will put together a self-critique of skills and development (skills audit and development plan), together with a plan that shows how they will develop areas for improvement.

Observation records alone are not sufficient sources of learner evidence; the original learner-generated evidence must also support them. Assessors should remember that they will be assessing the content of the presentation against the learning aim and not the skill with which the presentation was delivered. Video recordings could be used to support the evidence of any role-play activities. Learners should incorporate in-depth research, which should be supported by a fully referenced bibliography.



Getting started

This gives you a starting place for one way of delivering the unit, based around the recommended assessment approach in the specification.

Unit 14: Investigating Customer Service

Introduction

Begin by introducing the unit to learners through a group discussion exploring customer service provision in any businesses they know. This could be followed by outlining the learning aims of the unit.

Learning aim A – Explore how effective customer service contributes to business success

- Ask learners to give examples of personal experiences of good and poor customer service, and how that has affected their impression of the business. Learners could then develop their own definitions of customer service and discuss the findings with the group to devise a common definition.
- Discuss the benefits of building good customer relationships and the costs involved to a business of poor customer service. Guest speakers could be used to lead discussions on what happens if customers are lost through poor customer service, and what is involved in finding new customers in terms of building relationships and financial costs, particularly as studies show it costs about five times more to serve a new customer than an existing customer.
- Give input on the types of rules, procedures and codes of practice that must be followed by customer service staff when dealing with requests and complaints. Learners should work in small groups to research and gather information on the rules and procedures in different businesses, then report back to the whole class to share findings.
- Discuss a variety of customer service roles across a range of businesses and ask learners to investigate different approaches to delivery. This information could be obtained through independent internet research, visiting guest speakers, their own work experiences, or by visiting suitable businesses such as in the retail, call centre or hospitality sectors.
- Lead discussions on the needs and expectations of different types of internal and external customers. Learners could visit one or two local organisations to investigate how the customer service delivery meets the needs of their customers.
- Give learners information on current legislation and regulations and discuss how these impact on customer service provision. Use case studies where businesses have not met requirements, and arrange for guest speakers to give real examples to illustrate the implications of non-compliance on business success.

Learning aim B – Investigate the methods used to improve customer service in a business

- You could begin by discussing the reasons for monitoring customer service provision and why this is important for the business, the customer and the employee. This could be followed by visits to businesses, or independent research, to investigate the different monitoring methods used by businesses. Divide learners into small groups with each group researching the methods used in a range of different businesses. This could culminate in a group presentation exploring the reasons why and how the business monitors and evaluates its customer service provision, examining the advantages and disadvantages of each method used.

- A guest speaker could deliver a presentation to explain how monitoring and evaluation has led to improvements.
- Ask learners to give examples of how they have given feedback on customer service, such as through social media networking. Which methods are they most likely to respond to?
- Lead a discussion on the customer-profiling methods used by different businesses and develop this into a visual presentation such as a mind map or poster. Give learners different scenarios (for example, setting up a new shop, launching a website or a new product), and divide them into small groups to identify the most effective methods to help build a customer profile.
- Make copies of comment cards and questionnaires available to help learners identify the areas that companies think are important when evaluating their customer service provision.
- Ask learners to design and use a customer questionnaire themselves during their investigations. Divide into groups with each group selecting a different business for which to conduct their own review of the customer service provision.
- To help widen understanding of the methods used and how improvements could be made, each group could deliver a short presentation on the benefits to the customer, the business and the employee.

Learning aim C – Demonstrate customer service in different situations, using appropriate behaviours to meet expectations

- You could start by giving input on the communication and interpersonal skills needed for effective delivery, and show video clips of suitable scenarios to help learners understand how to prepare for customer service, including having an appropriate appearance and attitude.
- Allow plenty of opportunities for learners to practise and develop their communication skills in customer service situations for dealing with requests and complaints, giving constructive feedback on their performance, at the formative assessment stage.
- Create role-play activities for learners to demonstrate non-verbal communication skills covering aspects of body language such as eye contact and facial expressions, as well as consideration of appropriate dress and attitude, in order to convey the right message. The role plays must be suitable to enable learners to prepare for and participate effectively in a customer service context to demonstrate product or service knowledge while presenting a positive image.
- Individually, learners need to demonstrate effective verbal and non-verbal communication skills in customer service situations, and keep records of how they have carried this out. If they have a work placement or part-time employment this would help them to find appropriate examples. You, or an experienced witness, must keep an observation record to confirm which assessment criteria are met.
- Create a questionnaire and ask learners to rate their performance against different customer service skills and then individually complete a SWOT analysis to identify any gaps. Ask learners to keep a log or journal of their skills performance in different situations to help inform a personal assessment and review.
- Video record the role plays and ask learners to complete a peer assessment.
- Lead small group discussions, class presentations or one-to-one tutorials to allow learners to explain what went well, what they could have done differently, and what they need to improve. Give examples, such as better prioritisation of time, asking additional questions, clarifying the task or learning a new skill that would have made the task easier.



- Ask learners to produce a template development plan that enables objectives, resources needed to meet the objectives, review dates and evidence of progress being monitored on an ongoing basis to be recorded.

Details of links to other BTEC units and qualifications, and to other relevant units/qualifications

Pearson BTEC Level 3 Nationals in Business (NQF):

- Unit 1: Exploring Business.
- Unit 15: Investigating Retail Business.
- Unit 25: Aspects of Civil Law Affecting Business.
- Unit 26: Aspects of Criminal Law Impacting on Business and Individuals.
- Unit 29: Relationship Marketing.
- Unit 30: Legal Principles and Professional Ethics in Financial Services.
- Unit 31: Effective Management of Personal Debt.
- Unit 32: Buying for Business.

Resources

In addition to the resources listed below, publishers are likely to produce Pearson-endorsed textbooks that support this unit of the BTEC Nationals in Business. Check the Pearson website (<http://qualifications.pearson.com/endorsed-resources>) for more information as titles achieve endorsement.

Textbooks

- McManus S and Newby T – *Customer Service Pocketbook*, 3rd edition (Management Pocketbooks, 2013) ISBN 9781906610555.
This covers the basic principles of delivering excellent customer service.

Journals

- *Customer Focus* (Institute of Customer Service)
Quarterly journal of the Institute of Customer Service that looks at customer service strategy.

Websites

- www.instituteofcustomerservice.com
The website of the Institute of Customer Service whose purpose is to lead customer service performance and professionalism. It contains case studies, information, a glossary of terms and guidance notes.
- www.mindtools.com
This site contains tips and information on communication skills, in particular, questioning techniques.
- www.beta.tutor2u.net
This site has resources and revision materials with links to other sources of information.