Specification

Edexcel BTEC Level 1 Award in Customer Service (QCF)

First teaching from May 2011

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Edexcel, a Pearson company, is the UK's largest awarding body, offering academic and vocational qualifications and testing to more than 25,000 schools, colleges, employers and other places of learning in the UK and in over 100 countries worldwide. Qualifications include GCSE, AS and A Level, NVQ and our BTEC suite of vocational qualifications from entry level to BTEC Higher National Diplomas, recognised by employers and higher education institutions worldwide.

We deliver 9.4 million exam scripts each year, with more than 90% of exam papers marked onscreen annually. As part of Pearson, Edexcel continues to invest in cutting-edge technology that has revolutionised the examinations and assessment system. This includes the ability to provide detailed performance data to teachers and students which helps to raise attainment.

BTEC Specialist qualification titles covered by this specification

Edexcel BTEC Level 1 Award in Customer Service (QCF)

This qualification has been accredited to the Qualifications and Credit Framework (QCF) and is eligible for public funding as determined by the Department for Education (DfE) under Section 96 of the Learning and Skills Act 2000.

The qualification title listed above features in the funding lists published annually by the DfE and the regularly updated website www.education.gov.uk/. The QCF Qualification Number (QN) should be used by centres when they wish to seek public funding for their learners. Each unit within a qualification will also have a QCF unit code.

The QCF qualification and unit codes will appear on learners' final certification documentation.

The Qualification Number for the qualification in this publication is:

Edexcel BTEC Level 1 Award in Customer Service (QCF)   600/1499/4

This qualification title will appear on learners' certificates. Learners need to be made aware of this when they are recruited by the centre and registered with Edexcel.

This qualification is accredited by Ofqual as being a vocational component of Foundation Learning.

Welcome to the Edexcel BTEC Level 1 Award in Customer Service (QCF)

We are delighted to introduce our new qualification, available for teaching from May 2011. This qualification has been revised and conforms with the requirements of the new QCF (Qualifications and Credit Framework).

Focusing on the Edexcel BTEC Level 1 Award in Customer Service (QCF)

The Edexcel BTEC Level 1 Award in Customer Service (QCF) is designed for people working in, or aspiring to work in, customer service related roles.

Learners taking this qualification can progress into employment or to further education/training, including qualifications such as the Edexcel BTEC Level 2 Award/Certificate in Customer Service (QCF) and the Edexcel BTEC Level 3 Award/Certificate in Customer Service (QCF).

Straightforward to implement, teach and assess

Implementing BTECs couldn't be easier. They are designed to fit easily into your curriculum and can be studied independently or alongside existing qualifications, to suit the interests and aspirations of learners. The clarity of assessment makes grading learner attainment simpler.

Engaging for everyone

Learners of all abilities flourish when they can apply their own knowledge, skills and enthusiasm to a subject. BTEC qualifications make explicit the link between theoretical learning and the world of work by giving learners the opportunity to apply their research, skills and knowledge to work-related contexts and case studies. These applied and practical BTEC approaches give all learners the impetus they need to achieve and the skills they require for workplace or education progression.

Recognition

BTECs are understood and recognised by a large number of organisations in a wide range of sectors. BTEC qualifications are developed with key industry representatives and Sector Skills Councils (SSC) to ensure that they meet employer and learner needs — **in this case the Council for Administration, the SSC for the customer service sector.** Many industry and professional bodies offer successful BTEC learners exemptions from their own accredited qualifications.

All you need to get started

To help you off to a flying start, we've developed an enhanced specification that gives you all the information you need to start teaching BTEC. This includes:

- a framework of equivalencies, so you can see how this qualification compares with other Edexcel vocational qualifications

- information on rules of combination, structures and quality assurance, so you can deliver the qualification with confidence

- explanations of the content's relationship with the learning outcomes

- guidance on assessment, and what the learner must produce to achieve the unit.

Don't forget that we're always here to offer curriculum and qualification updates, local training and network opportunities, advice, guidance and support.

Contents

What are BTEC Level 1 Specialist qualifications?

BTEC Specialist qualifications are qualifications at Entry Level to Level 3 in the Qualifications and Credit Framework (QCF) and are designed to provide specialist work-related qualifications in a range of sectors. They give learners the knowledge, understanding and skills that they need to prepare for employment. The qualifications also provide career development opportunities for those already in work. Consequently they provide a course of study for full-time or part-time learners in schools, colleges and training centres.

BTEC Specialist qualifications provide much of the underpinning knowledge and understanding for the National Occupational Standards for the sector, where these are appropriate. They are supported by the relevant Standards Setting Body (SSB) or Sector Skills Council (SSC). A number of BTEC Specialist qualifications are recognised as the knowledge components of Apprenticeships Frameworks.

On successful completion of a BTEC Specialist qualification, learners can progress to or within employment and/or continue their study in the same, or related vocational area.

Care needs to be exercised when registering learners as the titling conventions and titles for the revised QCF versions of the BTEC Level 2 Firsts and BTEC Level 3 Nationals have changed.

The QCF is a framework which awards credit for qualifications and units and aims to present qualifications in a way that is easy to understand and measure. It enables learners to gain qualifications at their own pace along flexible routes.

There are three sizes of qualification in the QCF:

- Award (1 to 12 credits)

- Certificate (13 to 36 credits)

- Diploma (37 credits and above).

Every unit and qualification in the framework will have a credit value.

The credit value of a unit specifies the number of credits that will be awarded to a learner who has achieved the learning outcomes of the unit.

The credit value of a unit is based on:

- one credit for those learning outcomes achievable in 10 hours of learning

- learning time – defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria.

The credit value of the unit will remain constant in all contexts, regardless of the assessment method used for the qualification(s) to which it contributes.

Learning time should address all learning (including assessment) relevant to the learning outcomes, regardless of where, when and how the learning has taken place.

Edexcel BTEC Level 1 Award

The Edexcel BTEC Level 1 Award provides an introduction to the skills, qualities and knowledge that may be required for employment in a particular vocational sector.

Key features of the Edexcel BTEC Level 1 Award in Customer Service (QCF)

The Edexcel BTEC Level 1 Award in Customer Service (QCF) has been developed to give learners the opportunity to:

- engage in learning that is relevant to them and which will provide opportunities to develop a range of skills and techniques, personal skills and attributes essential for successful performance in working life
- achieve a nationally recognised level 1 vocationally-related qualification
- progress to employment in a customer service related role
- progress to related general and/or vocational qualifications.

National Occupational Standards

Where relevant, Edexcel BTEC level 1 qualifications are designed to provide some of the underpinning knowledge and understanding for the National Occupational Standards (NOS), as well as developing practical skills in preparation for work and possible achievement of NVQs in due course. NOS form the basis of National Vocational Qualifications (NVQs). Edexcel BTEC level 1 (QCF) qualifications do not purport to deliver occupational competence in the sector, which should be demonstrated in a work context.

Each unit in the specification identifies links to elements of the NOS in *Annexe C*.

The Edexcel BTEC Level 1 Award in Customer Service (QCF) relates to the Level 1 Customer Service NOS.

Rules of combination

The rules of combination specify the credits that need to be achieved, through the completion of particular units, for the qualification to be awarded. All accredited qualifications within the QCF have rules of combination.

Rules of combination for Edexcel BTEC Level 1 qualifications

When combining units for an Edexcel BTEC Level 1 Award in Customer Service (QCF), it is the centre's responsibility to ensure that the following rules of combination are adhered to.

1   Qualification credit value: a minimum of 10 credits.

2   Minimum credit to be achieved at, or above, the level of the qualification: 10 credits.

3   All credits must be achieved from the units listed in this specification.

Edexcel BTEC Level 1 Award in Customer Service (QCF)

The Edexcel BTEC Level 1 Award in Customer Service is a 10-credit and 60-guided learning-hour (GLH) qualification consisting of two mandatory units that provide for a total of 10 credits.

Edexcel BTEC Level 1 Award in Customer Service (QCF)			
Unit	Mandatory units	Credit	Level
1	Dealing with Customers and Their Expectations	3	1
2	Providing Safe and Effective Customer Service	7	1

Assessment

All units within this qualification are internally assessed. The qualifications are criterion referenced, based on the achievement of all the specified learning outcomes.

To achieve a 'pass' a learner must have successfully passed **all** the assessment criteria.

Guidance

The purpose of assessment is to ensure that effective learning has taken place to give learners the opportunity to:

- meet the standard determined by the assessment criteria, and

- achieve the learning outcomes.

All the assignments created by centres should be reliable and fit for purpose, and should be built on the unit assessment criteria. Assessment tasks and activities should enable learners to produce valid, sufficient and reliable evidence that relates directly to the specified criteria. Centres should enable learners to produce evidence in a variety of different forms, including performance observation, presentations and posters, along with projects, or time-constrained assessments.

Centres are encouraged to emphasise the practical application of the assessment criteria, providing a realistic scenario for learners to adopt, and making maximum use of practical activities. The creation of assignments that are fit for purpose is vital to achievement and their importance cannot be over-emphasised.

The assessment criteria must be clearly indicated in the assignments briefs. This gives learners focus and helps with internal verification and standardisation processes. It will also help to ensure that learner feedback is specific to the assessment criteria.

When designing assignments briefs, centres are encouraged to identify common topics and themes. A central feature of vocational assessment is that it allows for assessment to be:

- current, ie to reflect the most recent developments and issues

- local, ie to reflect the employment context of the delivering centre

- flexible to reflect learner needs, ie at a time and in a way that matches the learner's requirements so that they can demonstrate achievement.

Qualification grade

Learners who achieve the minimum eligible credit value specified by the rule of combination will achieve the qualification at pass grade.

In the Edexcel BTEC Level 1 Specialist qualifications each unit has a credit value which specifies the number of credits that will be awarded to a learner who has achieved the learning outcomes of the unit. This has been based on:

* one credit for those learning outcomes achievable in 10 hours of learning time

* learning time being defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria

* the credit value of the unit remaining constant regardless of the method of assessment used or the qualification to which it contributes.

Quality assurance of centres

Edexcel BTEC Level 1 qualifications provide a flexible structure for learners enabling programmes of varying credits and combining different levels. For the purposes of quality assurance, all individual qualifications and units are considered as a whole.

Centres delivering the Edexcel BTEC Level 1 must be committed to ensuring the quality of the units and qualifications they deliver, through effective standardisation of assessors and verification of assessor decisions. Centre quality assurance and assessment is monitored and guaranteed by Edexcel.

The Edexcel quality assurance processes will involve:

* centre approval for those centres not already recognised as a centre for BTEC qualifications

* approval for the Edexcel BTEC Level 1 qualifications and units

* **compulsory** Edexcel-provided training and standardisation for internal verifiers and assessors leading to the accreditation of lead internal verifiers via the OSCA system

* quality review of the centre verification practice

* centre risk assessment by Edexcel of overarching processes and quality standards

* remedial training and/or assessment sampling for centres identified through standardisation or risk assessment activities as having inadequate quality, assessment or internal verification processes.

Approval

Centres are required to declare their commitment to ensuring the quality of the programme of learning and providing appropriate assessment opportunities for learners that lead to valid and accurate assessment outcomes. In addition, centres will commit to undertaking defined training and online standardisation activities.

Centres already holding BTEC approval are able to gain qualification approval online. New centres must complete a centre approval application.

Quality Assurance Guidance

Details of quality assurance for the Edexcel BTEC Level 1 qualifications are set out in centre guidance which is published on our website (www.edexcel.com).

Programme design and delivery

Mode of delivery

Edexcel does not normally define the mode of delivery for Edexcel BTEC Entry to Level 3 qualifications. Centres are free to offer the qualifications using any mode of delivery (such as full-time, part-time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must ensure that learners have appropriate access to the resources identified in the specification and to the subject specialists delivering the units. This is particularly important for learners studying for the qualification through open or distance learning.

Learners studying for the qualification on a part-time basis bring with them a wealth of experience that should be utilised to maximum effect by tutors and assessors. The use of assessment evidence drawn from learners' work environments should be encouraged. Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to ensure a course relevant to learners' specific needs

- accessing and using non-confidential data and documents from learners' workplaces

- including sponsoring employers in the delivery of the programme and, where appropriate, in the assessment

- linking with company-based/workplace training programmes

- making full use of the variety of experience of work and life that learners bring to the programme.

Resources

Edexcel BTEC Level 1 qualifications are designed to give learners an understanding of the skills needed for specific vocational sectors. Physical resources need to support the delivery of the programme and the assessment of the learning outcomes, and should therefore normally be of industry standard. Staff delivering programmes and conducting the assessments should be familiar with current practice and standards in the sector concerned. Centres will need to meet any specific resource requirements to gain approval from Edexcel.

Where specific resources are required these have been indicated in individual units in the *Essential resources* sections.

Delivery approach

It is important that centres develop an approach to teaching and learning that supports the vocational nature of Edexcel BTEC level 1 qualifications and the mode of delivery. Specifications give a balance of practical skill development and knowledge requirements, some of which can be theoretical in nature. Tutors and assessors need to ensure that appropriate links are made between theory and practical application and that the knowledge base is applied to the sector. This requires the development of relevant and up-to-date teaching materials that allow learners to apply their learning to actual events and activity within the sector. Maximum use should be made of learners' experience.

Functional skills

Edexcel Level 1 BTEC Specialist qualifications give learners opportunities to develop and apply functional skills. Functional skills are, however, not required to be achieved as part of the BTEC Specialist qualification(s) rules of combination. Functional skills are offered as stand-alone qualifications.

Access and recruitment

Edexcel's policy regarding access to its qualifications is that:

- they should be available to everyone who is capable of reaching the required standards

- they should be free from any barriers that restrict access and progression

- there should be equal opportunities for all wishing to access the qualifications.

Centres are required to recruit learners to BTEC qualifications with integrity. This will include ensuring that applicants have appropriate information and advice about the qualifications and that the qualification will meet their needs. Centres should take appropriate steps to assess each applicant's potential and make a professional judgement about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Edexcel's policy on learners with particular requirements.

Centres will need to review the entry profile of qualifications and/or experience held by applicants, considering whether this profile shows an ability to progress to a higher level qualification.

Restrictions on learner entry

The Edexcel BTEC Level 1 Award in Customer Service (QCF) is accredited on the QCF for learners aged 14 and above.

Access arrangements and special considerations

Edexcel's policy on access arrangements and special considerations for BTEC and Edexcel NVQ qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the 1995 Disability Discrimination Act and the amendments to the Act) without compromising the assessment of skills, knowledge, understanding or competence.

Further details are given in the policy document *Access Arrangements and Special Considerations for BTEC and Edexcel NVQ Qualifications*, which can be found on the Edexcel website (www.edexcel.com). This policy replaces the previous Edexcel policy (Assessment of Vocationally Related Qualifications: Regulations and Guidance Relating to Learners with Special Requirements, 2002) concerning learners with particular requirements.

Recognition of Prior Learning

Recognition of Prior Learning (RPL) is a method of assessment (leading to the award of credit) that considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning.

Edexcel encourages centres to recognise learners' previous achievements and experiences whether at work, home and at leisure, as well as in the classroom. RPL provides a route for the recognition of the achievements resulting from continuous learning.

RPL enables recognition of achievement from a range of activities using any valid assessment methodology. Provided that the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable for accrediting a unit, units or a whole qualification. Evidence of learning must be sufficient, reliable and valid.

Unit format

All units in the Edexcel BTEC Level 1 Specialist qualifications have a standard format. The unit format is designed to give guidance on the requirements of the qualification for learners, tutors, assessors and those responsible for monitoring national standards.

Each unit has the following sections.

Unit title

The unit title is accredited on the QCF and this form of words will appear on the learner's Notification of Performance (NOP).

Unit code

Each unit is assigned a QCF unit code that appears with the unit title on the National Database of Accredited Qualifications.

QCF level

All units and qualifications within the QCF will have a level assigned to them, which represents the level of achievement. There are nine levels of achievement, from Entry Level to Level 8. The level of the unit has been informed by the QCF level descriptors and, where appropriate, the NOS and/or other sector/professional benchmarks.

Credit value

All units have a credit value. The minimum credit value that may be determined for a unit is one, and credits can only be awarded in whole numbers. Learners will be awarded credits for the successful completion of whole units.

Guided learning hours

Guided learning hours are defined as all the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim being studied on a programme. This definition includes lectures, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes time spent by staff assessing learners' achievements. It does not include time spent by staff in day-to-day marking of assignments or homework where the learner is not present.

Unit aim

The aim provides a clear summary of the purpose of the unit and is a succinct statement that summarises the learning outcomes of the unit.

Unit introduction

The unit introduction gives the reader an appreciation of the unit in the vocational setting of the qualification, as well as highlighting the focus of the unit. It gives the reader a snapshot of the unit and the key knowledge, skills and understanding gained while studying the unit. The unit introduction also highlights any links to the appropriate vocational sector by describing how the unit relates to that sector.

Learning outcomes

The learning outcomes of a unit set out what a learner is expected to know, understand or be able to do as the result of a process of learning.

Assessment criteria

The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or set of learning outcomes, has been achieved. The learning outcomes and assessment criteria clearly articulate the learning achievement for which the credit will be awarded at the level assigned to the unit.

Unit content

The unit content identifies the breadth of knowledge, skills and understanding needed to design and deliver a programme of learning to achieve each of the learning outcomes. This is informed by the underpinning knowledge and understanding requirements of the related National Occupational Standards (NOS), where relevant. The content provides the range of subject material for the programme of learning and specifies the skills, knowledge and understanding required for achievement of the unit.

Each learning outcome is stated in full and then the key phrases or concepts related to that learning outcome are listed in italics followed by the subsequent range of related topics.

Relationship between content and assessment criteria

The learner should have the opportunity to cover all of the unit content.

It is not a requirement of the unit specification that all of the content is assessed. However, the indicative content will need to be covered in a programme of learning in order for learners to be able to meet the standard determined in the assessment criteria.

Content structure and terminology

The information below shows the unit content is structured and gives the terminology used to explain the different components within the content.

- Learning outcome: this is shown in bold at the beginning of each section of content.

- Italicised sub-heading: it contains a key phrase or concept. This is content which must be covered in the delivery of the unit. Colons mark the end of an italicised sub-heading.

- Elements of content: the elements are in plain text and amplify the sub-heading. The elements must be covered in the delivery of the unit. Semi-colons mark the end of an element.

- Brackets contain amplification of content which must be covered in the delivery of the unit.

- 'eg' is a list of examples, used for indicative amplification of an element (that is, the content specified in this amplification could be covered or could be replaced by other, similar material).

Essential guidance for tutors

This section gives tutors additional guidance and amplification to aid understanding and a consistent level of delivery and assessment. It is divided into the following sections.

- *Delivery* – explains the content's relationship to the learning outcomes and offers guidance about possible approaches to delivery. This section is based on the more usual delivery modes but is not intended to rule out alternative approaches.

- *Outline learning plan* - the outline learning plan has been included in every unit as guidance and demonstrates one way in planning the delivery and assessment of a unit. The outline learning plan can be used in conjunction with the programme of suggested assignments.

- *Assessment* – gives amplification about the nature and type of evidence that learners need to produce in order to achieve the unit. This section should be read in conjunction with the assessment criteria.

- *Essential resources* – identifies any specialist resources needed to allow learners to generate the evidence required for each unit. The centre will be asked to ensure that any requirements are in place when it seeks approval from Edexcel to offer the qualification.

- *Indicative resource materials* – gives a list of learner resource material that benchmarks the level of study.

Units

Unit 1: Dealing with Customers and Their Expectations

Unit code: H/503/0532

QCF Level 1:   BTEC Specialist

Credit value: 3

Guided learning hours: 18

Unit aim

In this unit learners will develop knowledge of the expectations of different customers and understanding of how to ensure effective delivery of customer service.

Unit introduction

This unit is designed to introduce the basic customer service skills required at level 1.

Learners will develop knowledge of the different types of external and internal customers and their expectations. Learners will also learn about the different sources of information required to provide effective customer service and about appropriate behaviour towards customers.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Know expectations of different customers	1.1 Identify different types of external customers
	1.2 Identify different types of internal customers
	1.3 Describe expectations of internal and external customers
	1.4 Describe the connection between customer expectations and customer satisfaction in customer service
2 Understand how to ensure effective delivery of customer service	2.1 Explain why knowledge of an organisation's products and services is important in ensuring effective customer service
	2.2 Identify different sources of information on an organisation's products and services
	2.3 Describe types of communication used when delivering effective customer service
	2.4 Describe how the behaviour of customer service practitioners affects customers' experiences
	2.5 Explain how teamwork can ensure effective customer service

Unit content

1 Know expectations of different customers

External customers: external customers eg existing, new, individuals, groups, business people, non-English speaking, different ages, different cultures, gender, families, those with special needs (visual, hearing, mobility impairments)

Internal customers: internal customers eg colleagues, supervisors, warehouse staff, suppliers, agents of the organisation, teams

Expectations of different customers: identifying customer needs; providing value for money; providing quality; providing accurate and reliable information and advice; providing assistance and help; safe environment eg health and safety, security

What annoys customers: unable to meet expectations; unable to deliver on promises; lack of communication; rude staff; lack of care; not offering an explanation

Connection: service in line with the reputation of the organisation; customers' expectations of quality, customers' expectations of value

2 Understand how to ensure effective delivery of customer service

Importance of knowledge of an organisation's products and services: professionalism; meeting customer expectations; effect on reputation; effect on business; possible legal implications of giving incorrect information

Sources of information: brochures; leaflets; electronic eg intranet, internet, web pages; colleagues eg managers, supervisors; customers; trade organisations

Types of communication: non-verbal behaviour eg smiling, making eye contact, looking at customer, open body language, facial expression; spoken language eg appropriate greeting, speaking clearly, tone of voice, volume, speaking to people who do not have English as a first language

Impact: effect of business eg customer goes to competitors, customer tells others; effect on profit; effect on reputation

Teamwork: meeting customer expectations by working together; supporting each other; using expertise/experience of other team members; using different skills within the team

Essential guidance for tutors

Delivery

The unit could be delivered in the workplace or under simulated conditions.

Centres could involve guest speakers from the customer service sector in delivering the unit. Visits to customer service providers could also be incorporated in delivery.

Outline learning plan

The outline learning plan has been included in this unit as guidance and can be used in conjunction with the programme of suggested assignments.

The outline learning plan demonstrates one way in planning the delivery and assessment of this unit.

Topic and suggested assignments/activities and/assessment
Introduction to unit and programme of assignments. Activity on identifying learners' own experiences of customer service. What did they perceive as good and bad service? How could they have improved the service they experienced?
Learners to make a list of who are external customers with examples. Learners to discuss findings and make notes. Tutor to lead discussion on expectations of different customers, eg a businessperson expects sales staff to know differences in weight of different copy paper, may expect credit. Learners to discuss findings and make notes.
Learners to make lists of internal customers, eg warehouse staff delivering goods from a warehouse. Tutor to lead discussion of the effect internal customers can have on good customer service, eg if the warehouse staff are not efficient, customer may not get goods quickly.
Learners to identify why different types of information can help different types of customers and their expectations, eg knowing where to find information, types of literature (for customers, for trade).
Assignment 1: Customer expectations
Assignment 2: Delivering customer service effectively
Tutor to set a series of role plays for learners to act the parts of customers and customer service staff. Learners' peer groups to assess the role plays and identify strengths and weaknesses, both in spoken language and body language.
Review of unit and programme of assignments.

Assessment

Evidence for this unit could be gathered through a set of assignments and role plays. Evidence can be supported with discussions and visits to commercial organisations.

Programme of suggested assignments

The table below shows a programme of suggested assignments that cover the criteria in the assessment grid. This is for guidance only and it is recommended that centres either write their own assignments or adapt Edexcel assignments to meet local needs and resources.

Criteria covered	Assignment title	Scenario	Assessment method
LO 1	Assignment 1 Customer expectations	Learners are asked to identify expectations of four external and two internal customers. This could be done in pairs.	Presentation by the learner on the expectations of four different external and two different internal customers. Assessment is on the accuracy of their findings.
LO 2	Assignment 2 Delivering customer service effectively	Tutor to set a series of role plays for learners to act the parts of customers and customer service staff. The role play should include selling and service situations.	Role play assessed by tutor based on the learner's role as a customer service practitioner. Assessment to cover spoken language and body language.

Essential resources

Indicative resource materials

Textbooks

Carlaw P and Deming VK – *The Big Book of Customer Service Training Games* (McGraw Hill, 2007) (McGraw Hill, 2007) ISBN 9780077114763

Leland K and Bailey K – *Customer Service for Dummies* (John Wiley & Sons, 2006) ISBN 9780471768692

Timm P – *Customer Service: Career Success Through Customer Loyalty* (Prentice Hall, 2010) ISBN 9780135063972

Journal

Customerfirst magazine (Institute of Customer Service)

Website

Council for Administration   www.cfa.co.uk

Unit 2: Providing Safe and Effective Customer Service

Unit code: K/503/0533

QCF Level 1: BTEC Specialist

Credit value: 7

Guided learning hours: 42

Unit aim

This unit aims to develop learners' knowledge of typical customer service practices and procedures, of the risks and hazards when delivering customer service and of how to give a good impression to customers when delivering customer service.

Learners will also learn how to deal with customer queries, problems and complaints effectively and develop the ability to demonstrate appropriate behaviour when delivering customer service.

Unit introduction

This unit is designed to introduce the learner to the practices and procedures that constitute effective customer service. These include the importance of knowing when to refer customer service issues to someone in higher authority and how to minimise risks and hazards in order to deliver effective customer service.

Learners will learn how the behaviour of customer service practitioners impacts on the customer service experience. Learners will develop knowledge of how to deal with customer queries, problems and complaints effectively. Learners will also be able to develop their customer service skills by demonstrating appropriate behaviour when delivering customer service.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes		Assessment criteria	
1	Know how to follow organisational practices and procedures to deliver effective customer service	1.1	Describe key practices and procedures designed to ensure effective customer service
		1.2	Describe when customer service issues should be referred to a supervisor
		1.3	Describe the importance of not discriminating against customers in the delivery of customer service
		1.4	Describe the different types of confidential information that may be collected when providing customer service
		1.5	State the importance of maintaining confidentiality when delivering customer service in organisations
		1.6	Describe potential health and safety hazards and risks when delivering customer service
		1.7	Describe how to minimise potential health and safety hazards and risks when delivering customer service
2	Understand the importance of professionalism when delivering customer service	2.1	Explain what professionalism is in the delivery of customer service
		2.2	Explain the importance of professionalism when delivering customer service
3	Know how to deal with customer queries, problems and complaints effectively	3.1	State how to deal with customer queries
		3.2	Identify customer problems and complaints
		3.3	State how to deal with customer problems and complaints
4	Be able to demonstrate appropriate behaviour when delivering customer service	4.1	Deliver customer service in line with given procedures
		4.2	Minimise hazards and risks in the delivery of customer service, appropriate to role
		4.3	Respond to customer queries, problems and complaints appropriately
		4.4	Demonstrate appropriate behaviour when dealing with customers

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Unit content

1 Know how to follow organisational practices and procedures to deliver effective customer service

Key practices and procedures: procedures for customer service eg customer service policy, refunds procedure, returns procedure; procedures laid down by organisations eg limits of responsibility, organisational chart, dealing with complaints, policy for dealing with emergencies and security risks, keeping records, dealing with enquiries, handling financial transactions, refunds policy, contractual agreements with customers

Referring to supervisor: when outside limits of own authority eg giving refunds, offering compensation, giving complimentary products or services, passing on complaints and queries; when lacking the required information eg unable to answer customer query; when procedure requires need to check with line manager

Importance of not discriminating: equal opportunities eg treating everyone as equal, making allowances for customers with disability, treating both genders equally, not discriminating because of race, religious belief or sexual orientation; compliance with legislation; company reputation; customers feel welcome and at ease; moral obligation; ensuring repeat business

Confidential information: customer information eg address, telephone number, spending patterns, debt, credit and debit card details, details of purchases

Importance of confidentiality: for customers eg security of personal information, avoiding fraud, use to criminals; for organisations eg obeying the law/avoiding litigation, duty of care to customer, keeping data from rivals

Hazards and risks: potential injuries to customer eg from wet floor, uneven flooring, fire on premises, security alert

Minimising hazards and risks: identifying where customers could be injured; informing people of dangers eg signs on wet floors; compliance with fire regulations eg exits signed, location of fire extinguishers, fire practice, evacuation procedure, meeting points; security alerts eg taking messages, evacuation procedure, meeting points

2 Understand the importance of professionalism when delivering customer service

Professionalism: personal impression eg good manners, appropriate dress, using appropriate language, good posture/body language, tidy work area; positive attitude eg good timekeeping; knowledge of organisation's products and services; safe environment; offering assistance; being attentive

Importance of professionalism: customer satisfaction; company reputation; ensuring repeat business; first impressions count; professionalism

3 Know how to deal with customer queries, problems and complaints effectively

Dealing with customer queries: being polite; showing empathy with customer; keeping customers informed; not disagreeing; using appropriate body language

Customer problems and complaints: problems and complaints eg faults, not fit for purpose, poor service from internal customers, late deliveries, promises not kept

Dealing with problems and complaints: reporting customer service problems eg to supervisor, to management, to other persons able to resolve the problem, to suppliers; offering alternatives; exchanging product; offering goodwill gesture

4 Be able to demonstrate appropriate behaviour when delivering customer service

Following procedures: given procedures eg referring to someone in authority, dealing with refunds, dealing with questions you cannot answer, treating customers equally

Minimising hazards and risks: identifying where customers could be injured; informing people of dangers eg signs on wet floors; compliance with fire regulations eg exits signed, location of fire extinguishers, fire practice, evacuation procedure, meeting points; security alerts eg taking messages, evacuation procedure, meeting points

Dealing with customer queries, problems and complaints: dealing with queries eg being polite, showing empathy with customer, keeping customers informed, not disagreeing, using appropriate body language; dealing with problems and complaints eg reporting customer service problems (to supervisor, to management, to other persons able to resolve the problem, to suppliers), offering alternatives, exchanging product, offering goodwill gesture

Appropriate behaviour: demonstrating appropriate behaviour eg displaying appropriate body language, using appropriate language, good manners, being attentive, positive attitude, offering assistance, knowledge of products and services

Essential guidance for tutors

Delivery

This unit could be delivered in the workplace or under simulated conditions. Delivery of the unit should be concluded with a series of role plays that bring together all the learning outcomes in a demonstration of appropriate behaviour in a customer service situation.

Centres could involve guest speakers from the customer service sector in delivering the unit. Visits to customer service providers could also be incorporated in delivery.

Outline learning plan

The outline learning plan has been included in this unit as guidance and can be used in conjunction with the programme of suggested assignments.

The outline learning plan demonstrates one way of planning the delivery and assessment of this unit.

Topic and suggested assignments/activities and/assessment
Introduction to unit and programme of assignments.
Tutor-led activities on key practices in customer service. Learners to discuss examples of organisational practices and procedures and why they are important to effective customer service. Learners can use their own experiences, or those learned on visits to organisations. It would help at this stage if a guest speaker from the customer service sector could talk to learners about key practices and policies in their organisation.
Assignment 1: How effective customer service is delivered
Learners to discuss and suggest examples of when to refer customer service issues to someone in authority and ways that would be effective. Tutor-led discussion on the importance of dealing with customers equally. Learners to identify and discuss examples.
Assignment 2: Help!
Tutor-led discussion on confidentiality of information in customer service. Learners to identify and discuss examples.
Assignment 3: Confidential information
Tutor-led discussion ,with activities, on the legislation that can affect effective customer service. Discussion should include health and safety and protection of customer's security and property as well as data protection. Learners to suggest ways to minimise risks and hazards and identify how they affect customer service
Assignment 4: Hazards and risks
Learners to identify why it is important to give a good impression to customers. Learners to identify what can and what may not lead to a good impression of the organisation and the customer service they deliver.
Assignment 5: Professionalism

Topic and suggested assignments/activities and/assessment
Tutor to give examples of problems and complaints customers might have, and learners to suggest solutions to these problems.
Assignment 6: Problems and complaints
Tutor to set a series of role-play exercises for learners to demonstrate appropriate behaviour in customer service. Role play should give learners the opportunity to identify and follow appropriate procedures. Some of the role play should include complaints and queries.
Review of unit and programme of assignments.

Assessment

Evidence for this unit can be gathered through set assignments and role play. Evidence can be supported by discussion and visits to commercial organisations.

Programme of suggested assignments

The table below shows a programme of suggested assignments that cover the criteria in the assessment grid. This is for guidance only and it is recommended that centres either write their own assignments or adapt Edexcel assignments to meet local needs and resources.

Criteria covered	Assignment title	Scenario	Assessment method
LO 1.1	Assignment 1 How effective customer service is delivered	Learners have just started work in the customer service sector and have been asked to give a presentation to a group of school leavers.	Presentation on importance of practices and procedures in ensuring effective customer service. Presentation should explain the differences between practice and procedure ,give examples of the differences and explain why they are important for effective customer service.
LO 1.2, 1.3	Assignment 2 Help!	Learners have just started work in the customer service sector and have been asked to produce a leaflet for new staff explaining the importance of treating all customers equally, when and why new staff should seek help and who they should seek it from.	Production of a leaflet on why dealing with all customers equally is important in the delivery of effective customer service. Examples of why customer service practitioners may need to refer to someone in authority. Learners should include examples of who the person in authority might be and how they would refer to them

Criteria covered	Assignment title	Scenario	Assessment method
LO 1.4, 1.5	Assignment 3 Confidential information	Learners work in the customer service sector and have been asked to give a presentation to a new starter in the organisation.	Learners to give a brief informal presentation on how customer service practitioners protect the security of customer information.
LO 1.6, 1,7	Assignment 4 Hazards and risks	Learners are asked by their line manager to produce a set of posters illustrating risks and hazards.	Learners to produce a set of posters illustrating four different risks or hazards and advice on how to minimise them.
LO 2.1, 2.2	Assignment 5 Professionalism	Learners work in the customer service sector and have been asked to give a brief presentation to new staff on the importance of being professional with customers. The brief should include examples of current and prospective customers.	Learners to give a presentation, with examples that illustrate the importance of showing professionalism when dealing with customers.
LO 3.1, 3.2, 3.3	Assignment 6 Problems and complaints	Assignment showing three examples of possible customer problems and complaints. Learners to identify how they would deal with the problems successfully for the customer.	Written answers on solutions to the problems provided. Assessment is based on how well learners would deal with the problems to customers' satisfaction.
LO 2.1, 2.2, 4.1, 4.2, 4.3, 4.4	Assessed role play.	Tutor to set a series of role plays for learners to demonstrate that they can show appropriate behaviour when delivering customer service.	Learners will be assessed on their performance in being able to keep to set procedures, managing risks and hazards and in demonstrating appropriate behaviour.

Essential resources

Indicative resource materials

Textbooks

Carlaw P and Deming VK – *The Big Book of Customer Service Training Games* (McGraw Hill, 2007) ISBN 9780077114763

Leland K and Bailey K – *Customer Service for Dummies* (John Wiley & Sons, 2006) ISBN 9780471768692

Timm P – *Customer Service: Career Success Through Customer Loyalty* (Prentice Hall, 2010) ISBN 9780135063972

Journal

Customerfirst magazine (Institute of Customer Service)

Website

Council for Administration   www.cfa.co.uk

Further information

For further information please call Customer Services on 0844 576 0026 (calls may be recorded for training purposes) or visit our website (www.edexcel.com).

Useful publications

Related information and publications include:

- *Guidance for Centres Offering Edexcel/BTEC QCF Accredited Programmes* (Edexcel, distributed to centres annually)

- functional skills publications – specifications, tutor support materials and question papers

- *Regulatory arrangements for the Qualification and Credit Framework* (published by Ofqual) August 2008

- the current Edexcel publications catalogue and update catalogue.

Edexcel publications concerning the Quality Assurance System and the internal and external verification of vocationally related programmes can be found on the Edexcel website and in the Edexcel publications catalogue.

NB: Some of our publications are priced. There is also a charge for postage and packing. Please check the cost when you order.

How to obtain National Occupational Standards

Please contact:

Council for Administration
6 Graphite Square
Vauxhall Walk
London
SE11 5EE

Telephone: 020 7091 9620
Email: info@cfa.uk.com
Website: www.cfa.uk.com

Professional development and training

Edexcel supports UK and international customers with training related to BTEC qualifications. This support is available through a choice of training options offered in our published training directory or through customised training at your centre.

The support we offer focuses on a range of issues including:

• planning for the delivery of a new programme

• planning for assessment and grading

• developing effective assignments

• building your team and teamwork skills

• developing student-centred learning and teaching approaches

• building functional skills into your programme

• building in effective and efficient quality assurance systems.

The national programme of training we offer can be viewed on our website (www.edexcel.com/training). You can request customised training through the website or by contacting one of our advisers in the Training from Edexcel team via Customer Services to discuss your training needs.

Our customer service numbers are:

BTEC and NVQ	0844 576 0026
GCSE	0844 576 0027
GCE	0844 576 0025
The Diploma	0844 576 0028
DiDA and other qualifications	0844 576 0031

Calls may be recorded for training purposes.

The training we provide:

• is active – ideas are developed and applied

• is designed to be supportive and thought provoking

• builds on best practice.

Our training is underpinned by the LLUK standards for those preparing to teach and for those seeking evidence for their continuing professional development.

Annexe A

The Edexcel/BTEC qualification framework for the Customer Service sector

Progression opportunities within the framework.

Level	General qualifications	BTEC full vocationally-related qualifications	BTEC specialist courses	NVQ/occupational
4				Edexcel Level 4 NVQ Diploma in Customer Service (QCF) Edexcel Level 4 NVQ for Contact Centre Professionals
3			Edexcel BTEC Level 3 Award in Customer Service (QCF) Edexcel BTEC Level 3 Certificate in Customer Service (QCF) Edexcel BTEC Level 3 Award in Contact Centre Supervisory Skills	Edexcel Level 3 NVQ Diploma in Customer Service (QCF) Edexcel Level 3 NVQ for Contact Centre Professionals Edexcel Level 3 NVQ in Telesales
2			Edexcel BTEC Level 2 Award in Customer Service (QCF) Edexcel BTEC Level 2 Certificate in Customer Service (QCF) Edexcel BTEC Level 2 Award in Contact Centre Skills	Edexcel Level 2 NVQ Certificate in Customer Service (QCF) Edexcel Level 2 NVQ in Contact Centre Operations Edexcel Level 2 NVQ in Telesales
1			Edexcel BTEC Level 1 Award in Customer Service (QCF)	Edexcel Level 1 NVQ Certificate in Customer Service (QCF) Edexcel Level 1 NVQ in Contact Centre Operations

Annexe B

Wider curriculum mapping

Study of the Edexcel BTEC Level 1 qualifications gives learners opportunities to develop an understanding of spiritual, moral, ethical, social and cultural issues as well as an awareness of citizenship, environmental issues, European developments, health and safety considerations and equal opportunities issues.

Spiritual, moral, ethical, social and cultural issues

Throughout the delivery of the qualification learners will have the opportunity to actively participate in different kinds of decision making. They will have to consider fair and unfair situations and explore how to resolve conflict. Working in small groups they will learn how to respect and value others' beliefs, backgrounds and traditions.

Citizenship

Learners undertaking these qualifications will have the opportunity to develop their understanding of citizenship issues.

Environmental issues

Developing a responsible attitude towards the care of the environment is an integral part of this qualification. Learners are encouraged to minimise waste and discuss controversial issues.

European developments

Much of the content of the qualification applies throughout Europe, even though the delivery is in a UK context.

Health and safety considerations

Health and safety is embedded within the units in this qualification. Learners will consider their own health and safety at work, how to identify risks and hazards and how to minimise them.

Equal opportunities issues

There will be opportunities throughout this qualification to explore different kinds or rights and how they affect both individuals and communities, for example learners will consider their rights at work and the rights of employers and how these rights affect the work community.

Annexe C

National Occupational Standards/mapping with NOS

The grid below maps the knowledge covered in the Edexcel BTEC Level 1 Award in Customer Service (QCF) against the underpinning knowledge of the National Occupational Standards in Customer Service.

KEY

\# indicates partial coverage of the NOS unit

a blank space indicates no coverage of the underpinning knowledge

Units	Unit 1: Dealing with Customers and Their Expectations	Unit 2: Providing Safe and Effective Customer Service
Unit F1: Communicate using customer service language		#
Unit F2: Follow the rules to deliver customer service		#
Unit A1: Maintain a positive and customer-friendly attitude	#	#
Unit A2: Adapt your behaviour to give a good customer service impression		#
Unit A3: Communicate effectively with customers		#
Unit A4: Give customers a positive impression of yourself and your organisation		#
Unit B1: Do your job in a customer friendly way	#	#
Unit B2: Deliver reliable customer service	#	#
Unit C1: Recognise and deal with customer queries, requests and problems		#
Unit C2: Take details of customer service problems		#

Annexe D

Mapping to level 1 functional skills

Level 1	Unit number	
English — Speaking, Listening and Communication	**1**	**2**
Take full part in formal and informal discussions and exchanges that include unfamiliar subjects	✓	✓
English — Reading		
Read and understand a range of straightforward texts	✓	✓
English — Writing		
Write a range of texts to communicate information, ideas and opinions, using formats and styles suitable for their purpose and audience	✓	✓

Annexe E

Unit mapping overview

BTEC Level 1 Short Course in Customer Service legacy (specification end date 31/04/2010)/new QCF version of the Edexcel BTEC Level 1 Award in Customer Service (QCF) (specification start date 01/05/2011)

Old units / New units	Unit 1	Unit 2	Unit 3
Unit 1	P	P	
Unit 2	P	F	P

KEY

P – Partial mapping (some topics from the old unit appear in the new unit)

F – Full mapping (topics in old unit match new unit exactly or almost exactly)

X – Full mapping + new (all the topics from the old unit appear in the new unit, but new unit also contains new topic(s))

BA025384 – Specification – Edexcel BTEC Level 1 Award specialist qualification in
Customer Service (QCF) – Issue 1 – May 2011 © Edexcel Limited 2011

Annexe F

Glossary of Accreditation Terminology

The following information about this qualification can also be found on the Edexcel website (www.edexcel.com).

Accreditation start/end date	The first/last dates that Edexcel can register learners for a qualification.
Certification end date	The last date on which a certificate may be issued by Edexcel.
Credit value	All units have a credit value. The minimum credit value that may be determined for a unit is one, and credits can only be awarded in whole numbers. Learners will be awarded credits for the successful completion of whole units.
Guided Learning Hours (GLH)	Guided learning hours are defined as all the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim being studied on a programme. This definition includes lectures, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes time spent by staff assessing learners' achievements. It does not include time spent by staff in day-to-day marking of assignments or homework where the learner is not present.
Learning Aims Database	Link to the Learning Aims Database, which features detailed funding information by specific learning aim reference.
Learning Aim Reference	Unique reference number given to the qualification by the funding authorities on accreditation.
Level	The level at which the qualification is positioned in the Qualifications and Credit Framework (QCF).
Performance tables	This qualification is listed on the Department for Education (DfE) website School and College Achievement and Attainment Tables (SCAAT) as performance indicators for schools and colleges.
Qualification Number (QN)	Unique reference number given to the qualification by the regulatory authorities on accreditation.
Register of Regulated Qualifications	Link to the entry on the Register of Regulated Qualifications for a particular qualification. This database features detailed accreditation information for the particular qualification.

Section 96	Section 96 is a section of the Learning and Skills Act 2000. This shows for which age ranges the qualification is publicly funded for under-19 learners.
Title	The accredited title of the qualification.
UCAS points	This qualification is listed on the Universities and Colleges Admissions Service (UCAS) tariff for those wishing to progress to higher education.

Annexe G

BTEC Specialist and Professional qualifications

BTEC qualifications on the NQF	Level	BTEC Specialist and Professional qualifications on the QCF	BTEC qualification suites on the QCF
BTEC Level 7 Advanced Professional qualifications BTEC Advanced Professional Award, Certificate and Diploma	**7**	**BTEC Level 7 Professional qualifications** BTEC Level 7 Award, Certificate, Extended Certificate and Diploma	
BTEC Level 6 Professional qualifications BTEC Professional Award, Certificate and Diploma	**6**	**BTEC Level 6 Professional qualifications** BTEC Level 6 Award, Certificate, Extended Certificate and Diploma	
BTEC Level 5 Professional qualifications BTEC Professional Award, Certificate and Diploma	**5**	**BTEC Level 5 Professional qualifications** BTEC Level 5 Award, Certificate, Extended Certificate and Diploma	**BTEC Level 5 Higher Nationals** BTEC Level 5 HND Diploma
BTEC Level 4 Professional qualifications BTEC Professional Award, Certificate and Diploma	**4**	**BTEC Level 4 Professional qualifications** BTEC Level 4 Award, Certificate, Extended Certificate and Diploma	**BTEC Level 4 Higher Nationals** BTEC Level 4 HNC Diploma
BTEC Level 3 qualifications BTEC Award, Certificate, Extended Certificate and Diploma	**3**	**BTEC Level 3 Specialist qualifications** BTEC Level 3 Award, Certificate, Extended Certificate and Diploma	**BTEC Level 3 Nationals** BTEC Level 3 Certificate, Subsidiary Diploma, Diploma and Extended Diploma

BTEC qualifications on the NQF	Level	BTEC Professional and Specialist qualifications on the QCF	BTEC qualification suites on the QCF
BTEC Level 2 qualifications BTEC Award, Certificate, Extended Certificate and Diploma	**2**	**BTEC Level 2 Specialist qualifications** BTEC Level 2 Award, Certificate, Extended Certificate and Diploma	**BTEC Level 2 Firsts** BTEC Level 2 Certificate, Extended Certificate and Diploma
BTEC Level 1 qualifications BTEC Award, Certificate, Extended Certificate and Diploma	**1**	**BTEC Level 1 Specialist qualifications** BTEC Level 1 Award, Certificate, Extended Certificate and Diploma	**BTEC Level 1 qualifications** BTEC Level 1 Award, Certificate and Diploma (vocational component of Foundation Learning)
	E	**BTEC Entry Level Specialist qualifications** BTEC Entry Level Award, Certificate, Extended Certificate and Diploma	**BTEC Entry Level qualifications (E3)** BTEC Entry Level 3 Award, Certificate and Diploma (vocational component of Foundation Learning)

NQF = National Qualifications Framework

QCF = Qualifications and Credit Framework

For most qualifications on the **NQF**, the accreditation end date is normally 31 August 2010 or 31 December 2010.

For qualifications on the **QCF**, the accreditation start date is usually 1 September 2010 or 1 January 2011.

QCF qualification sizes

Award	1-12 credits
Certificate	13-36 credits
Diploma	37+ credits