

Pearson BTEC Entry Level Award in Customer Service (Entry 3)

Pearson BTEC Entry Level Certificate in Customer Service (Entry 3)

Specification

BTEC Specialist qualification

First teaching January 2015

Issue 2

Edexcel, BTEC and LCCI qualifications

Edexcel, BTEC and LCCI qualifications are awarded by Pearson, the UK's largest awarding body offering academic and vocational qualifications that are globally recognised and benchmarked. For further information, please visit our qualifications website at qualifications.pearson.com. Alternatively, you can get in touch with us using the details on our contact us page at qualifications.pearson.com/contactus

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This specification is Issue 2. Key changes are listed in the summary table on the next page. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: qualifications.pearson.com

These qualifications were previously known as:

Pearson BTEC Entry Level Award in Customer Service (Entry 3) (QCF)

Pearson BTEC Entry Level Certificate in Customer Service (Entry 3) (QCF)

The QNs remain the same.

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All information in this specification is correct at time of publication.

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Summary of Pearson BTEC Entry Level Award/Certificate in Customer Service (Entry 3) Issue 2 changes

Summary of changes made between previous issue and this current issue	Page/section number
All references to QCF have been removed throughout the specification	
Definition of TQT added	Section 1
Definition of sizes of qualifications aligned to TQT	Section 1
Credit value range removed and replaced with lowest credit value for the shortest route through the qualification	Section 2
TQT value added	Section 2
GLH range removed and replaced with lowest GLH value for the shortest route through the qualification	Section 2
Reference to credit transfer within the QCF removed	Section 5
QCF references removed from unit titles and unit levels in all units	Section 12
Guided learning definition updated	Section 12

Earlier issue(s) show(s) previous changes.

If you need further information on these changes or what they mean, contact us via our website at: qualifications.pearson.com/en/support/contact-us.html.

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Purpose of this specification

The purpose of a specification as defined by Ofqual is to set out:

- the qualification's objective
- any other qualification that a learner must have completed before taking the qualification
- any prior knowledge, skills or understanding that the learner is required to have before taking the qualification
- units that a learner must have completed before the qualification will be awarded and any optional routes
- any other requirements that a learner must have satisfied before they will be assessed or before the qualification will be awarded
- the knowledge, skills and understanding that will be assessed as part of the qualification (giving a clear indication of their coverage and depth)
- the method of any assessment and any associated requirements relating to it
- the criteria against which the learner's level of attainment will be measured (such as assessment criteria)
- any specimen materials
- any specified levels of attainment.

1 Introducing BTEC Specialist qualifications

BTEC Specialist qualifications are work-related qualifications available from Entry to Level 3 in a range of sectors. They give learners the knowledge, understanding and skills they need to prepare for employment in a specific occupational area. The qualifications also provide career development opportunities for those already in work. The qualifications may be offered as full-time or part-time courses in schools or colleges. Training centres and employers may also offer these qualifications.

Sizes of Specialist qualifications

For all regulated qualifications, we specify a total number of hours that learners are expected to undertake in order to complete and show achievement for the qualification – this is the Total Qualification Time (TQT). The TQT value indicates the size of a qualification.

Within the TQT, we identify the number of Guided Learning Hours (GLH) that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

As well as guided learning, there may be other required learning that is directed by tutors or assessors. This includes, for example, private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

As well as TQT and GLH, qualifications can also have a credit value – equal to one tenth of TQT, rounded to the nearest whole number.

TQT and credit values are assigned after consultation with users of the qualifications.

BTEC Specialist qualifications are available in the following sizes:

- Award – a qualification with a TQT value of 120 or less (equivalent to a range of 1–12 credits)
- Certificate – a qualification with a TQT value in the range of 121–369 (equivalent to a range of 13–36 credits)
- Diploma – a qualification with a TQT value of 370 or more (equivalent to 37 credits and above).

2 Qualification summary and key information

Qualification title	Pearson BTEC Entry Level Award in Customer Service (Entry 3)
Qualification Number (QN)	601/5305/2
Accreditation start date	01/01/2015
Approved age ranges	14-16 16-18 19+
Credit value	6
Assessment	Centre-devised assessment (internal assessment).
Total Qualification Time (TQT)	60
Guided learning hours	52
Grading information	The qualification and units are at pass grade.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must follow our access and recruitment policy (see <i>Section 10 Access and recruitment</i>).

Qualification title	Pearson BTEC Entry Level Certificate in Customer Service (Entry 3)
Qualification Number (QN)	601/5306/4
Accreditation start date	01/01/2015
Approved age ranges	14-16 16-18 19+
Credit value	13
Assessment	Centre-devised assessment (internal assessment).
Total Qualification Time (TQT)	130
Guided learning hours	122
Grading information	The qualification and units are at pass grade.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must follow our access and recruitment policy (see <i>Section 10 Access and recruitment</i>).

Qualification Number and qualification title

Centres will need to use the Qualification Number (QN) when they seek public funding for their learners.

The qualification title, unit titles and QN are given on each learner's final certificate. You should tell your learners this when your centre recruits them and registers them with us. There is more information about certification in our *UK Information Manual*, available on our website, qualifications.pearson.com

Qualification objective

The Pearson BTEC Entry Level Award in Customer Service (Entry 3) is designed to introduce learners to the basic knowledge and attitudes to enhance their employability for customer-facing job roles across vocational sectors. The qualification is specifically for learners who are further away from the job market and so need support to develop their ability and confidence to take on further training and learning in preparation for employment.

Learners will have the opportunity to explore the basic concepts that underpin customer service in any context, with an emphasis on communication skills, essential personal qualities and behaviours, standards of presentation, typical roles and tasks and employment rights and responsibilities.

The Pearson BTEC Entry Level Certificate in Customer Service (Entry 3) extends the work-related focus through a range of optional units to provide learners with key employability skills and further occupational knowledge to support progression into employment or further training and learning in customer service. This includes skills in using email and producing a CV, and knowledge related to dealing with customers' queries and problems, personal development and health and safety at work. Learners are likely to include NEETs (those not in education, employment or training), school leavers or those intending to return to the workplace after unemployment.

Relationship with previous qualifications

These are new qualifications which do not replace any qualification previously offered by Pearson.

Progression opportunities through Pearson qualifications

Learners working towards these qualifications are likely to increase their own confidence and motivation to learn, in addition to their engagement with and interest in the customer service sector and service-related roles. These qualifications will support progression to further learning such as developing additional employability skills, Vocational Studies, a Traineeship programme or progression through a Level 1 qualification in a sector-specific area.

Qualifications include:

- Pearson BTEC Level 1 Award in Principles of Customer Service
- Pearson BTEC Level 1 Certificate in Principles of Customer Service.

For some learners, the Pearson BTEC Entry Level Certificate in Customer Service (Entry 3) qualification will be sufficient to give them the skills and knowledge required to obtain a job directly after completion.

Industry support and recognition

These qualifications are supported by Skills CFA, the SSC for the customer service sector.

Relationship with National Occupational Standards

These qualifications relate to the National Occupational Standards in Customer Service. The mapping document in *Annexe A* shows the links between the units within this qualification and the National Occupational Standards.

3 Qualification structures

Pearson BTEC Entry Level Award in Customer Service (Entry 3)

The learner will need to meet the requirements outlined in the table below before Pearson can award the qualification.

6 credits must be achieved from the three mandatory units.

Unit	Unit reference number	Mandatory units	Level	Credit	Guided learning hours
1	L/506/8823	Introduction to Working in a Customer Service Role	Entry 3	2	17
2	R/506/8824	Understanding Customer Service	Entry 3	3	25
3	H/503/2815	Investigating Rights and Responsibilities at Work	Entry 3	1	10

Pearson BTEC Entry Level Certificate in Customer Service (Entry 3)

The learner will need to meet the requirements outlined in the table below before Pearson can award the qualification.

Minimum number of credits that must be achieved	13
Number of mandatory credits that must be achieved	6
Minimum number of optional credits that must be achieved	7

Unit	Unit reference number	Mandatory units	Level	Credit	Guided learning hours
1	L/506/8823	Introduction to Working in a Customer Service Role	Entry 3	2	17
2	R/506/8824	Understanding Customer Service	Entry 3	3	25
3	H/503/2815	Investigating Rights and Responsibilities at Work	Entry 3	1	10
		Optional units			
4	L/505/6929	Introduction to Health and Safety at Work	Entry 3	2	20
5	L/506/8837	Understanding How to Deal with Customers' Requests, Queries and Problems	1	2	20
6	Y/506/8825	Using Email	Entry 3	1	10
7	F/505/6930	Produce a CV	Entry 3	2	20
8	T/501/7235	Managing Own Learning	Entry 3	3	30

Centres should be aware that within the Pearson BTEC Entry Level Certificate in Customer Service (Entry 3), learners may choose optional Unit 5: *Understanding How to Deal with Customers' Requests, Queries and Problems* at Level 1. Centres are advised to consider the support, guidance and opportunities they give to learners to meet the demands of the higher-level unit during delivery and assessment of the qualification.

4 Assessment

The table below gives a summary of the assessment methods used in the qualifications.

Units	Assessment method
All units	Centre-devised assessment

Centre-devised assessment (internal assessment)

Each unit has specified learning outcomes and assessment criteria. To pass an internally assessed unit, learners must meet all of the unit's learning outcomes. Centres may find it helpful if learners index and reference their evidence to the relevant learning outcomes and assessment criteria.

Centres need to write assignment briefs for learners to show what evidence is required. Assignment briefs should indicate clearly which assessment criteria are being targeted.

Assignment briefs and evidence produced by learners must meet any additional requirements given in the *Information for tutors* section of each unit.

Unless otherwise indicated in *Information for tutors*, the centre can decide the form of assessment evidence (for example performance observation, presentations, projects, tests, extended writing) as long as the methods chosen allow learners to produce valid, sufficient and reliable evidence of meeting the assessment criteria.

Centres are encouraged to give learners realistic scenarios and to maximise the use of practical activities in delivery and assessment.

To avoid over-assessment, centres are encouraged to link delivery and assessment across units.

There is more guidance about internal assessment on our website. For details please see *Section 13 Further information and useful publications*.

5 Recognising prior learning and achievement

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.

Pearson encourages centres to recognise learners' previous achievements and experiences in and outside the workplace, 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. If 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.

Further guidance is available in our policy document *Recognition of Prior Learning Policy and Process*, available on our website, qualifications.pearson.com

6 Centre resource requirements

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

General resource requirements

- Centres must have appropriate physical resources (for example IT, learning materials, teaching rooms) to support delivery and assessment.
- Staff involved in the assessment process must have relevant expertise and occupational experience.
- There must be systems in place that ensure continuing professional development (CPD) for staff delivering the qualifications.
- Centres must have in place appropriate health and safety policies relating to the use of equipment by learners.
- Centres must deliver the qualifications in accordance with current equality legislation. For further details on Pearson's commitment to the Equality Act 2010, please see *Section 10 Access and recruitment* and *Section 11 Access to qualifications for learners with disabilities or specific needs*. For full details of the Equality Act 2010, please go to www.legislation.gov.uk

Specific resource requirements

As well as the general resource requirements given above, there are specific resources that centres must provide. They are listed by unit below.

Unit	Resources required
4: Introduction to Health and Safety at Work	<i>The Health and Safety Toolbox</i> , published by The Health & Safety Executive (2013)
6: Using Email	LAN with email application software or access to web-based emailing software and access to the internet; suitable software tools and equipment

7 Centre recognition and approval

Centres that have not previously offered Pearson qualifications need to apply for, and be granted, centre recognition as part of the process for approval to offer individual qualifications.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by a new qualification and the conditions for automatic approval are met.

Guidance on seeking approval to deliver BTEC qualifications is given on our website.

Approvals agreement

All centres are required to enter into an approval agreement that is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and any associated codes, conditions or regulations.

Pearson will act to protect the integrity of the awarding of qualifications. If centres do not comply with the agreement, this could result in the suspension of certification or withdrawal of approval.

8 Quality assurance of centres

Quality assurance is at the heart of vocational qualifications. The centre assesses BTEC qualifications. The centre will use quality assurance to make sure that their managers, internal verifiers and assessors are standardised and supported. Pearson use quality assurance to check that all centres are working to national standards. It gives us the opportunity to identify and provide support, if needed, to safeguard certification. It also allows us to recognise and support good practice.

For the qualifications in this specification, the Pearson quality assurance model will follow one of the processes listed below.

- 1 Delivery of the qualification as part of a BTEC Apprenticeship ('single click' registration):
 - an annual visit by a Standards Verifier to review centre-wide quality assurance systems and sampling of internal verification and assessor decisions.
- 2 Delivery of the qualification outside the Apprenticeship:
 - an annual visit to the centre by a Centre Quality Reviewer to review centre-wide quality assurance systems
 - Lead Internal Verifier accreditation – this involves online training and standardisation of Lead Internal Verifiers using our OSCA platform, accessed via Edexcel Online. Please note that not all qualifications will include Lead Internal Verifier accreditation. Where this is the case, each year we will allocate a Standards Verifier to conduct postal sampling of internal verification and assessor decisions for the Principal Subject Area.

For further details please see the *UK Vocational Quality Assurance Handbook* on our website, qualifications.pearson.com

9 Programme delivery

Centres are free to offer these qualifications using any mode of delivery (for example full-time, part-time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must make sure that learners have access to the resources identified in the specification and to the subject specialists delivering the units.

Those planning the programme should aim to enhance the vocational nature of the qualifications by:

- liaising with employers to make sure that a course is relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- developing up-to-date and relevant teaching materials that make use of scenarios that are relevant to the sector
- giving learners the opportunity to apply their learning in practical activities
- including sponsoring employers in the delivery of the programme and, where appropriate, in assessment
- making full use of the variety of experience of work and life that learners bring to the programme.

Where legislation is taught, centres must ensure that it is current and up to date.

10 Access and recruitment

Pearson's policy regarding access to our 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 those wishing to access the qualifications.

Centres are required to recruit learners to BTEC Specialist qualifications with integrity.

Applicants will need relevant information and advice about the qualification to make sure it meets their needs.

Centres should review the applicant's prior qualifications and/or experience, considering whether this profile shows that they have the potential to achieve the qualification.

For learners with disabilities and specific needs, this review will need to take account of the support available to the learner during teaching and assessment of the qualification. The review must take account of the information and guidance in *Section 11 Access to qualifications for learners with disabilities or specific needs*.

Learners may be aged between 14 and 16 and therefore potentially vulnerable. Where learners are required to spend time and be assessed in work settings, it is the centre's responsibility to ensure that the work environment they go into is safe.

11 Access to qualifications for learners with disabilities or specific needs

Equality and fairness are central to our work. Pearson's Equality Policy requires all learners to have equal opportunity to access our qualifications and assessments. It also requires our qualifications to be awarded in a way that is fair to every learner.

We are committed to making sure that:

- learners with a protected characteristic (as defined by the Equality Act 2010) are not, when they are undertaking one of our qualifications, disadvantaged in comparison to learners who do not share that characteristic
- all learners achieve the recognition they deserve from undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

Learners taking a qualification may be assessed in British sign language or Irish sign language where it is permitted for the purpose of reasonable adjustments.

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

Details on how to make adjustments for learners with protected characteristics are given in the document *Pearson Supplementary Guidance for Reasonable Adjustment and Special Consideration in Vocational Internally Assessed Units*.

Both documents are on our website, qualifications.pearson.com

12 Units

Units have the following sections.

Unit title

This is the formal title of the unit that will appear on the learner's certificate.

Unit reference number

Each unit is assigned a unit reference number that appears with the unit title on the Register of Regulated Qualifications.

Level

All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors defined by Ofqual, the qualifications regulator.

Credit value

When a learner achieves a unit, they gain the specified number of credits.

Guided learning hours

Guided Learning Hours (GLH) is the number of hours that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

Unit aim

This gives a summary of what the unit aims to do.

Essential resources

This section lists any specialist resources needed to deliver the unit. The centre will be asked to make sure that these resources are in place when it seeks approval from Pearson to offer the qualification.

Learning outcomes

The learning outcomes of a unit set out what a learner knows, understands or is able to do as the result of a process of learning.

Assessment criteria

Assessment criteria specify the standard required by the learner to achieve each learning outcome.

Unit amplification

Unit amplification sets out the range of subject material required for the programme of learning and specifies the knowledge and understanding required for achievement of the unit. It enables centres to design and deliver a programme of learning that will enable learners to achieve each learning outcome and to meet the standard determined by the assessment criteria.

Where relevant and/or appropriate, unit amplification is informed by the underpinning knowledge and understanding requirements of related National Occupational Standards (NOS).

Relationship between amplification and assessment criteria

Although it is not a requirement that all of the amplification is assessed, learners should be given the opportunity to cover it all. However, the indicative amplification (see below) will need to be covered in a programme of learning to enable learners to meet the standard determined in the assessment criteria.

Legislation

Legislation cited in the units is current at time of publication. The most recent legislation should be taught and assessed internally.

Information for tutors

This section gives tutors information on delivery and assessment. It contains the following subsections.

- *Delivery* – explains the content's relationship to the learning outcomes and offers guidance on possible approaches to delivery.
- *Assessment* – gives information about the evidence that learners must produce, together with any additional guidance if appropriate. This section should be read in conjunction with the assessment criteria, learning outcomes and unit amplification.
- *Suggested resources* – lists resource materials that can be used to support the teaching of the unit, for example books, journals and websites.

Unit 1: Introduction to Working in a Customer Service Role

Unit reference number: L/506/8823

Level: Entry 3

Credit value: 2

Guided learning hours: 17

Unit aim

This unit will develop learners' understanding of what is involved in working in a customer service role, including the different job roles available and typical tasks. The unit introduces learners to the skills, personal qualities, behaviours and standards of personal presentation that are required in all customer service roles.

Learners will also look at the importance of communication in customer service and the skills needed to communicate appropriately with different people in a customer service context. They will examine the types of communication most commonly used, including written, verbal and non-verbal, and the use of positive communication skills with customers.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria		Unit amplification
1	Know the activities carried out in a customer service role	1.1	Identify different customer service jobs	<ul style="list-style-type: none"> □ <i>Customer service jobs</i>: e.g. retail assistant in a shop or retail outlet, customer service assistant at a bank/building society or online/catalogue retailer, receptionist in an office, serving behind a food counter, working on the customer service or information desk in a railway station, hospital or tourist attraction, working in a beauty or hairdressing salon, sales adviser at a contact centre
		1.2	Identify the typical tasks carried out in a customer service role	<ul style="list-style-type: none"> □ <i>Typical tasks</i>: tasks vary depending on job role; range of tasks: meeting and greeting visitors/customers, dealing directly with customers by telephone, email or face to face, answering customer queries, dealing with customer problems, providing information, dealing with customer complaints, processing customer transactions, maintaining customer/visitor records; carrying out tasks within limits of own authority and given instructions

Learning outcomes		Assessment criteria		Unit amplification
2	Know the skills, personal presentation and behaviours required to work in a customer service role	2.1	Identify the skills and personal qualities needed to work in a customer service role	<ul style="list-style-type: none"> □ <i>Skills</i>: communication skills (verbal, written, non-verbal); numeracy skills; computer skills; listening skills; problem-solving skills; time management; team working skills □ <i>Personal qualities</i>: politeness; friendliness; empathy; confidence, ability to remain calm under pressure; well organised; good attention to detail
		2.2	Identify personal behaviours that impact on how customers view an organisation	<ul style="list-style-type: none"> □ <i>Positive behaviours</i>: polite, friendly, approachable, knowledgeable □ <i>Negative behaviours</i>: rude, impatient, careless
		2.3	State the standards of personal appearance expected of customer service staff in different roles	<ul style="list-style-type: none"> □ <i>Standards of personal appearance</i>: clothing, e.g. smart clothing, uniforms or special hygiene clothing as required by the job (clean, professional, minimal jewellery); good personal hygiene, e.g. clean and brushed hair, clean fingernails, no body odour; name badge if provided □ <i>Different roles</i>: customer facing/non-customer facing; depending on the occupation, e.g. airline cabin crew, waiter, retail assistant, call centre worker

Learning outcomes		Assessment criteria		Unit amplification
3	Know how to interact with customers	3.1	Outline why good communication is important in customer service	<ul style="list-style-type: none"> □ <i>Importance for customer service</i>: building good relationships with customers; exchange information accurately; give positive impression of the organisation; encourage repeat business
		3.2	Identify different ways of communicating with customers	<ul style="list-style-type: none"> □ <i>Different ways of communicating</i>: verbal, e.g. spoken, face to face, telephone call; written, e.g. email, letter, text message, social media; non-verbal, e.g. body language, gestures, posture, facial expressions
		3.3	Outline how to communicate directly with customers in a positive way	<ul style="list-style-type: none"> □ <i>Verbal communication</i>: clear speech; pronouncing words properly; use of professional language and organisational greeting standards; personal introductions □ <i>Non-verbal communication</i>: appropriate eye contact,; good posture; warm and confident smile; correct tone and pitch of voice; physical distance; appropriate facial expressions and hand gestures; listening to customers
		3.4	State how to recognise when a customer needs attention	<ul style="list-style-type: none"> □ <i>Customer actions</i>: e.g. customer making eye contact, looking at products, handling products, appearing confused, looking around for staff, reading information on products, asking questions
		3.5	State how to respond to a customer who needs attention	<ul style="list-style-type: none"> □ <i>Ways of responding</i>: e.g. acknowledging the customer, responding professionally and politely, asking questions to identify their needs, acting in the required timescale, apologising for any delays, giving full attention to the customer

Information for tutors

Delivery

This unit could be delivered through group, class, or one-to-one teaching and learning. Guest speakers and visits to relevant places of work where learners could experience customer service in action would be engaging and would help to consolidate their learning.

For learning outcome 1, a tutor-led discussion would be useful to help learners identify the different customer service job roles and related job activities. Learners will have everyday experiences of different customer service jobs and will be able to make a significant contribution to the discussion. In addition, a guest speaker with a customer service background could introduce the unit to learners.

For learning outcome 2, role play, group discussion and watching videos featuring customer service behaviours, attitudes and personal presentation would help learners understand the behaviours, attitudes and presentation styles required in various customer service roles across the sector.

For learning outcome 3, videos and role play could be used to show a range of situations involving customers and possible methods of communicating with them. Both positive and negative examples should be used, and learners should be encouraged to discuss, as a group, the appropriateness or otherwise of the verbal and non-verbal communication demonstrated. Tutors could show video clips on body language and the impact that this has when dealing with customers.

More traditional delivery methods could also be used, such as handouts, 'talk and chalk', and question and answer sessions. However, learners' different learning styles should be addressed in order to help them learn as effectively as possible, while keeping them fully engaged.

Assessment

The centre will devise and mark the assessment for this unit.

To evidence achievement of learning outcomes 1 and 2, learners could research at least two different customer service job roles in different sectors. Learners could identify the tasks, skills, personal qualities and standard of behaviour and appearance specific to each of these job roles. Learner evidence could be in the form of a report or presentation. For each of the chosen job roles, learners should provide the following evidence, as a minimum, to meet the assessment requirements:

- identify at least two tasks and two different types of skill and personal quality
- identify at least one type of positive behaviour and at least one type of negative behaviour
- state at least two different features of personal appearance.

Learners could evidence achievement of learning outcome 3 through written work resulting from a visit to a customer service work environment. Learner evidence could be in the form of an information leaflet or presentation.

To meet the assessment requirements, learners should provide the following evidence as a minimum:

- give at least two reasons why good communication is important
- identify at least two different ways each of communicating verbally, non-verbally and in writing
- give at least two examples each of verbal and non-verbal ways of communicating positively with customers
- state at least two different ways of recognising when a customer needs attention and two ways of responding to these customers.

It may be possible to assess the unit through a series of question and answer (Q&A) sessions, which could be conducted orally or through written responses. If Q&A is used, learners should still provide the evidence requirements stated above to meet the assessment standard, and learner responses should be based on a particular job role and context, whether real life or a case study. Where learners use evidence produced orally, the assessor should produce observation records that have sufficient detail to show why the assessor decided that each learning outcome had been met. Any supporting evidence in the form of written materials, documents and learner notes should be retained as part of the assessment evidence to enable internal and external quality assurance processes to be conducted.

Tutors and assessors should ensure that the correct operative verbs, as used in the assessment criteria, are included in all assessments.

Suggested resources

Books

Tutor resources

Kamin M – *10 Steps to Successful Customer Service* (ASTD Press, 2010)
ISBN 9781562865900

McManus S – *The Customer Service Pocket Book* (Management Pocket Books Ltd, 2013) ISBN 978190661055

Websites

<http://customerservicezone.com/video> – The Customer Service Zone, includes links to free customer service videos

www.wikihow.com/Develop-Good-Communication-Skills

Unit 2:

Understanding Customer Service

Unit reference number: R/506/8824

Level: Entry 3

Credit value: 3

Guided learning hours: 25

Unit aim

Learners who are interested in working in a customer service environment need to understand the importance of good customer service and how organisations deliver customer service to meet the needs and expectations of their customers.

This unit will develop learners' understanding of the importance of customer service, both to the customer and to the organisation. Learners will find out about the different types of customer and their expectations, the different ways in which organisations provide goods and services, and the procedures and rules that must be followed to deliver good customer service.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria		Unit amplification
1	Know why good customer service is important	1.1	Define the term 'customer service'	<ul style="list-style-type: none"> □ <i>Definition of customer service:</i> everything an organisation does to meet its customers' expectations and make them happy
		1.2	State why good customer service is important to customers	<ul style="list-style-type: none"> □ <i>Importance:</i> value for money; prompt service, e.g. reduced waiting times; confidence and trust in goods and services
		1.3	State why good customer service is important to an organisation	<ul style="list-style-type: none"> □ <i>Importance:</i> business success, e.g. encourages repeat business, improves organisation's reputation and image; confidence, e.g. improves customer confidence in dealing with the organisation, builds trust and brand loyalty; improved customer communications, e.g. to stay connected to customers, to receive valuable feedback; staff, e.g. happier staff, lower turnover of staff

Learning outcomes		Assessment criteria		Unit amplification
2	Know the different types of customers and their expectations	2.1	Identify the difference between an internal and an external customer	<ul style="list-style-type: none"> □ <i>Customer</i>: definition of customer □ <i>Internal customer</i>: within the same organisation (colleagues, supervisors, contractors, staff at another branch, managers) □ <i>External customer</i>: outside the organisation (shoppers of different ages, nationalities, needs and abilities)
		2.2	State what is meant by customer expectations	<ul style="list-style-type: none"> □ <i>Customer expectations</i>: expected standard of service, e.g. helpful and knowledgeable staff, variety of products, value for money, quick service, courtesy, respect, accurate information, reliable service
		2.3	State what is meant by customer satisfaction	<ul style="list-style-type: none"> □ <i>Customer satisfaction</i>: customer's level of happiness with the service received, e.g. receiving prompt attention, right goods at the right price, good service and care, positive and helpful communications
		2.4	State the consequences if customer service does not meet customer expectations	<ul style="list-style-type: none"> □ <i>Consequences of poor customer service</i>: organisation reputation; complaints; loss of business and income

Learning outcomes		Assessment criteria		Unit amplification
3	Know how organisations deliver customer service	3.1	Identify ways in which an organisation could provide products and services to customers	<ul style="list-style-type: none"> □ <i>Ways to provide products and services:</i> face to face, e.g. in a shop or other retail or service establishment; online, e.g. e-commerce, e-training, email; mail order, e.g. catalogue ordering; newsletters and updates, e.g. email and texts
		3.2	Identify how products and services could be related to each other to provide customer satisfaction	<ul style="list-style-type: none"> □ <i>Relating products and services:</i> complementary products and/or services, e.g. mobile phone purchase with insurance for loss/damage, fitting rooms to try on garments, offering a delivery service for bulky and large items, fitting carpets, different payment options for goods/services purchased
		3.3	Identify the types of procedure organisations use in delivering customer service	<ul style="list-style-type: none"> □ <i>Types of procedure:</i> different procedures depending on the products/services and job activities, e.g. answering the telephone (telephone scripts), receiving visitors, making refunds and taking payments, handling customer complaints and problems, dealing with enquiries, keeping customer records, dealing with difficult customers, dealing with emergencies
		3.4	Outline the legal rules that an organisation must follow when dealing with customers	<ul style="list-style-type: none"> □ <i>Legal rules (legislation):</i> data confidentiality (Data Protection Act 1998); accurate description of goods (Sale of Goods Act 1979); must not mislead the customer about the quality of the product (Trade Descriptions Act 1968); must provide services at the proper standard and carried out with reasonable care and skill (Supply of Goods and Services Act 1982); must protect the health and safety of customers (Health and Safety at Work Act 1974); must treat all customers equally and respect diversity (Equality Act 2010)
		3.5	State how teamwork helps in delivering customer service	<ul style="list-style-type: none"> □ <i>Benefits of teamwork:</i> consistent service; cover for absences; sharing of ideas and expertise; ability to meet customer expectations by working together

Information for tutors

Delivery

In delivering the unit, the tutor could arrange for a customer service manager or customer service supervisor from a local retailer to visit to share their experiences of customer service and its importance with learners. This would give learners a frame of reference for the upcoming learning and would also contribute towards some of the information learners need to apply to parts of the unit content.

For learning outcomes 1 and 2, the tutor could lead a group discussion to build on and consolidate what learners gained from the guest speaker. Tutors also need to draw on learners' own experiences of being customers in a retail context; learners could share their expectations in different contexts, how they reacted if their expectations were not met and how they felt if their expectations were met. The tutor could use learner responses to emphasise the meaning of key terms such as *customers*, *internal customers*, *external customers*, *customer expectations* and *customer satisfaction*.

For learning outcome 3, videos or case studies about how different organisations deliver good customer service could be used to help learners identify the different aspects of customer service delivery. A group discussion could then follow on how specific examples from the videos or case studies helped the organisations to meet customers' expectations.

Assessment

The centre will devise and mark the assessment for this unit.

To achieve the unit, learners could research a particular organisation, its customers and how it delivers customer service to meet the expectations of customers. The organisation could be the learner's work experience placement or one they are familiar with for other reasons.

It would be best for the assessment to be presented as a single project with a series of related tasks where learners could produce their evidence in different formats, such as reports, presentations and information leaflets. For example, a learner could prepare a presentation or short report to evidence achievement of learning outcome 2. In the report or presentation, the learner could outline the different internal and external customers of the organisation, their expectations of the organisation's product and/or service, whether they are satisfied with the product and/or service provided and why, and any potential or actual consequences the organisation has faced due to poor customer service. For learning outcomes 1 and 3, the learner could produce an information leaflet for new customer service staff to show why customer service is important to the organisation and its different customers, and how the organisation goes about delivering customer service. This would need to include the different ways in which the organisation provides its products and/or services, the related products and/or services it offers to improve customer satisfaction, the procedures and practices it has in place to deliver good customer service, and how it follows relevant legislation in the delivery of customer service.

Learners should provide the following evidence, as a minimum, to meet the assessment requirements:

- give at least two reasons why customer service is important to an organisation and at least two reasons why it is important for its customers
- identify at least two examples each of internal and external customers
- give at least three examples of customer expectations of the organisation's products and/or services
- state at least two consequences of poor customer service
- identify at least two different types of procedure used in the delivery of customer service
- outline the ways in which the organisation is following at least two legal rules (learners do not need give details of each piece of legislation)
- state at least two ways in which teamwork helps to deliver good customer service.

It may be possible to assess the unit through a series of question and answer (Q&A) sessions, which could be conducted orally or through written responses. If Q&A is used, learners should still provide the evidence requirements stated above to meet the assessment standard and learner responses should be based on a particular context, whether real life or a case study. Where learners use evidence produced orally, the assessor should produce observation records that have sufficient detail to show why they decided that each learning outcome had been met. Any supporting evidence in the form of written materials, documents and learner notes should be retained as part of the assessment evidence to enable internal and external quality assurance processes to be conducted.

Tutors and assessors should ensure that the correct operative verbs, as used in the assessment criteria, are included in all assessments.

Suggested resources

Books

Bacal R – *Perfect Phrases for Customer Service, Second Edition (Perfect Phrases Series)* (McGraw-Hill Professional, 2011) ISBN 9780071745062

Bounds A – *The Snowball Effect: Communication Techniques to Make You Unstoppable* (Capstone, 2013) ISBN 9780857083975

Evenson R – *Customer Service Training 101: Quick and Easy Techniques That Get Great Results* (Amacom, 2010) ISBN 9780814416419

Websites

www.customerserviceexcellence.uk.com	Customer Service Excellence - home to the government's customer service standard
www.customerservicezone.com/video	The Customer Service Zone – includes links to free customer service videos
www.instituteofcustomerservice.com	The Institute of Customer Service is the professional body for customer service

Unit 3: Investigating Rights and Responsibilities at Work

Unit reference number: H/503/2815

Level: Entry 3

Credit value: 1

Guided learning hours: 10

Unit aim

This unit aims to provide learners with knowledge of the rights and responsibilities of employees, of how to consider the rights of others, and where in the workplace to get advice and support if problems arise.

All employees have rights and responsibilities. This unit will introduce learners to the concept of having rights at work and what their responsibilities are as employee. Learners will explore employee rights, for example to be safe at work, to be healthy at work, to have fair pay and to be treated fairly. They will also consider the importance of respecting others in the workplace. Practical examples such as appropriate use of language and respecting people's cultures and beliefs will be discussed.

The unit goes on to explore the responsibilities that the learner has when they are employed or participating in work experience. Learning will focus around their responsibility to arrive on time, dress appropriately and complete tasks efficiently and effectively within agreed timelines.

It is very important to know who to go to for support if difficulties arise at work. Learners will research different sources of support that available to them both.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria		Unit amplification
1	Know rights of employees in the workplace	1.1	Identify aspects of working life where employees have rights	<ul style="list-style-type: none"> □ <i>Workplace rights</i>: own rights in the workplace e.g. salary or wages, contract for employment, termination of employment, discrimination and harassment, dealing with trouble at work, health and safety, working hours, holiday entitlement, breaks, leave entitlement, privacy of personal information (Data Protection Act)
2	Know how to respect the rights of others in the workplace	2.1	Outline how the rights of others should be respected in the workplace	<ul style="list-style-type: none"> □ <i>Respecting the rights of others</i>: respecting others e.g. right to express opinions and ideas, respect other cultures, religions and views, appropriate use of language, knowledge of what could offend, privacy of others' personal information
3	Know employee responsibilities in the workplace	3.1	Identify responsibilities of employees in the workplace	<ul style="list-style-type: none"> □ <i>Workplace responsibilities</i>: health and safety; understand what the employee is expected to do at work; punctuality; reliability; honesty; complete tasks allocated; follow instructions
4	Know where to get help for problems with rights and responsibilities at work	4.1	Identify sources of help for problems with rights and responsibilities within the workplace	<ul style="list-style-type: none"> □ <i>Sources of help and advice</i>: advisers e.g. line manager, human resources department, occupational health, health and safety adviser; documents e.g. policies, staff handbook, intranet, trade unions

Information for tutors

Delivery

The focus of this unit is on the rights and responsibilities of the individual as an employee in the workplace. Reference to corresponding employer rights and responsibilities is likely to be made in any discussion of the issues, although it does not form part of the assessment for the unit.

Although learners do not need to have access to the workplace, it would be helpful if they could relate the learning to an actual customer service workplace, either through past experience, a current job or work placement. They should have the opportunity to talk to others who have direct experience of the workplace in order to relate the theory to a real situation. They could also use role play and other simulations to increase their understanding.

Learners should be able to identify a range of areas where they have rights at work (for example right to a clean and safe workplace, to be treated fairly, to be paid a fair wage on time, not to be discriminated against on grounds of gender, sexual orientation, age, race, disability, religious beliefs). Knowledge of legislation is not required for this unit. Learners may be encouraged to gather information from a range of sources on their rights, e.g. Jobcentre Plus, Connexions, library, internet.

Learners will require an opportunity to demonstrate an understanding that their own behaviour has an effect on the rights of others. Either within a workplace setting (for example at work for those already employed or on work placement) or through simulation, learners could show that they are respecting the rights of others. This might be through speaking in a way that does not cause offence, not distracting others, respecting other people's property, not putting other people in danger, or not discriminating unfairly against people. Learners could be encouraged to find the rights and responsibilities policy for their own setting. Discussion could focus on the appropriateness of the document, for example whether it is clear, easy to read and contains appropriate images which show respect for the rights of others.

In addition to the behaviours identified above, learners will need to identify their responsibilities to an employer (for example to follow instructions, to work to the best of their ability, to be honest, to be punctual, not to waste the employer's time, to follow company or organisational procedures such as phoning when they are ill and unable to come in to work or to present themselves neatly and cleanly in the workplace). Learners with access to the workplace could supplement their evidence with a witness statement to the effect that they are behaving as a responsible employee. The statement should make clear what behaviours have been observed.

Learners only need to identify sources of support for rights and responsibilities within the workplace (for example their supervisor, the human resources department, a staff handbook). They do not need to raise actual issues or problems, only to know where they could turn should such issues arise. Speakers may be invited to share their experiences of seeking advice in the workplace.

Assessment

The centre will devise and mark the assessment for this unit.

To achieve 1.1, learners should identify at least three different aspects of working life for which they have rights as an employee. Evidence could be presented in a range of formats, such as a poster or leaflet, a recorded discussion with the tutor or a list.

To achieve 2.1, learners should outline how the rights of others can be respected. In order to do this, learners could be provided with different scenarios or clips from a film or television programme. The clips or scenarios should highlight different situations, for example an employee dominating the conversation in a meeting or someone using offensive language. Learners could then explain how the situation could be changed to respect the rights of others.

For 3.1, learners need to identify at least three different responsibilities of employees in the workplace.

For 4.1, learners should identify three different sources of help if a problem arises with rights and responsibilities at work.

If any of the above evidence is provided as a result of discussions with the tutor, written evidence must be available for internal and external verification.

Suggested resources

Websites

www.acas.org.uk

www.adviceguide.org.uk

www.direct.gov.uk/en/Employment/Employees/index.htm

www.direct.gov.uk/en/Governmentcitizensandrights/index.htm/

www.tuc.org.uk

www.worksmart.org.uk

Unit 4: Introduction to Health and Safety at Work

Unit reference number: L/505/6929

Level: Entry 3

Credit value: 2

Guided learning hours: 20

Unit aim

The aim of this unit is to introduce learners to their personal responsibilities for health and safety at work. Learners will explore types of workplace hazard and emergency and how to keep healthy for work.

This unit will help learners to prepare for a work placement.

Health and safety is a very important aspect in the workplace and all employees have responsibilities relating to it. It is important that people know how to look after themselves in the workplace so that they can stay healthy and work effectively.

This unit will help learners to understand some of the hazards and emergencies that can occur in the workplace. Learners will develop an awareness of their own responsibilities and actions in relation to reducing the risk of harm to self and others. This includes knowing how to follow instructions concerning hazards in the workplace environment and where to report any problems.

Essential resources

For this unit, centres need *The Health and Safety Toolbox*, published by The Health & Safety Executive (2013), which is a reference guide providing authoritative information on health and safety practice in the workplace with case studies and 'dos and don'ts' for key hazards.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria		Unit amplification
1	Know about health and safety for the workplace	1.1	Identify own responsibilities for keeping self and others safe in the workplace	<ul style="list-style-type: none"> □ <i>Own health and safety responsibilities:</i> understand what an employee is expected to do at work; to take care of own health and safety and of others who may be affected by own actions; follow instructions; be aware of the person to whom health and safety matters should be reported; know own limitations in dealing with a risk; not to interfere with, or misuse, anything provided for own or others' health, safety or welfare; use work items provided by the employer correctly in accordance with training and instructions; own behaviour for safe practice in the workplace, e.g. remaining alert to the presence of risk in the workplace environment; own conduct in minimising risk
		1.2	Identify who to go to in the workplace for health and safety help and support	<ul style="list-style-type: none"> □ <i>Sources of support:</i> advisers, e.g. line manager/supervisor, human resources department, occupational health, health and safety adviser
		1.3	Outline why it is important to keep self healthy for work	<ul style="list-style-type: none"> □ <i>Importance of keeping healthy for work:</i> work more efficiently; increased self-esteem; increased enjoyment of work; quality of work could suffer if worker is unhealthy; regular attendance
		1.4	Identify ways to stay healthy for work	<ul style="list-style-type: none"> □ <i>Ways to stay healthy for work:</i> appropriate equipment, e.g. suitable chair, keyboard arm rests, foot rests; taking regular breaks; exercise; diet; adequate sleep; dealing effectively with stress; different needs for different environments, e.g. office, outdoors, working in a hospital; different types of illness and injury, e.g. repetitive strain injury, colds, flu and other illnesses

Learning outcomes		Assessment criteria		Unit amplification
2	Know potential workplace hazards	2.1	Identify common workplace hazards	<ul style="list-style-type: none"> □ <i>Common workplace hazards:</i> definition of terms; hazards, e.g. faulty wiring, trailing flexes, torn carpet, broken glass, dangerous chemicals, visual display unit (VDU) screens, faulty equipment, poor posture when using computer, wet floors; manual handling; personal protective equipment and clothing; working at height; working with animals; working with computers; vehicles and transport
		2.2	Identify common hazard safety signs	<ul style="list-style-type: none"> □ <i>Common safety hazard signs:</i> e.g. fire exit, fire extinguisher, fire door keep shut, no smoking, electrical safety, first aid; accident report book; posters, e.g. health and safety legislation poster
3	Know about workplace emergencies	3.1	List the types of emergency that can occur in the workplace	<ul style="list-style-type: none"> □ <i>Types of emergency:</i> e.g. accidents, severe illness, fire, flood, power outages, chemical spills, terrorism, bomb threats
		3.2	Identify own responsibility if an emergency situation occurs in the workplace	<ul style="list-style-type: none"> □ <i>Own responsibility in emergency situations:</i> know the appropriate way to report an emergency promptly; raise the alarm; follow instructions of emergency personnel, e.g. first aider, fire warden; stay calm

Information for tutors

Delivery

The unit has been designed to make the key topics practically based wherever possible. Tutors delivering this unit have the opportunity to use a wide range of techniques and resources including presentations, seminars, practical workshops, external visits and simulations. Additional learning resources could include video, DVDs, case studies, web-based research, learner presentations, and group work.

The Health and Safety Toolbox, published by The Health and Safety Executive (2013), is a key reference guide providing authoritative information on health and safety practice in the workplace with case studies and 'dos and don'ts' for key hazards.

Speakers from different areas of work could be invited to talk to the group on the importance of keeping healthy at work. This may include reference to the benefits that a healthy workforce has for a company or organisation. When discussing illnesses and injuries at work, it is important to make this as relevant as possible for learners. If they have already been in work, they will be able to refer to their own experiences. However, this will be difficult for learners who have not had any work experience. One way to overcome this would be to refer to their classroom experiences or work at home. Topics such as repetitive strain injury, posture, colds and flu could then be discussed in this context.

Learners may be able to visit different workplace environments with relevance to customer service to observe health and safety practices and signs and could create a checklist, leaflet, poster or presentation giving information about health and safety in the workplace for other learners to follow.

Learners could speak to friends or relatives who are in employment and ask them about health and safety in their workplace environments. Video clips and case studies may be useful in helping learners understand the importance of health and safety in the workplace. In groups, learners could complete web-based research into health and safety practices in different customer service workplace environments and then report back to the rest of the group. Simulation activities could be used for some procedures, for example a fire drill.

Assessment

The centre will devise and mark the assessment for this unit.

The evidence for this unit may be combined in one assignment task such as producing a series of health and safety factsheets or posters. This could involve supported internet research, images collected from magazines and brief explanations. Alternatively, the learner may participate in group discussions or one-to-one tutorials, recorded by the tutor for verification purposes.

For 1.1, learners should identify their own responsibilities in relation to keeping self and others safe in a workplace (either real or simulated). The real or simulated workplace will need at least one clear responsibility for the learner to identify.

For 1.2, learners need to identify who to go to for workplace health and safety help and support. This could be the person responsible for health and safety in a specific workplace environment (either real or simulated). Where more than one person is responsible for health and safety, learners need only identify one person.

For 1.3, learners need to outline two reasons why it is important for individuals to keep themselves healthy for work.

For 1.4, learners need to identify two different ways to stay health for work.

To meet the requirements for 2.1, learners need to identify two common hazards in a workplace environment. The examples identified must show that the learner understands the definition of a hazard (according to Health and Safety Executive definitions).

For 2.2, learners need to correctly identify three common workplace hazard signs.

3.1 and 3.2 could be combined in one factsheet, leaflet or other appropriate form of evidence. For 3.1, learners need to list at least two specific examples of emergencies which could occur in a workplace setting. For 3.2, learners need to identify own responsibility in the event of a workplace emergency situation.

Suggested resources

Websites

www.hse.gov.uk

Unit 5: Understanding How to Deal with Customers' Requests, Queries and Problems

Unit reference number: L/506/8837

Level: 1

Credit value: 2

Guided learning hours: 20

Unit aim

This unit will develop learner knowledge of how to deal with customer queries, requests and problems. This is a key area that learners will need to be competent in when working in any customer service environment. Learners will explore the types of queries and problems that are likely to arise in a customer service situation, why they occur and who can help to resolve them to meet the needs and expectations of customers.

Learners will look at the different types of query that customers have and how to anticipate that a problem may be occurring. Learners will consider the types of behaviour they will need to display in key situations and when to escalate issues to a higher authority. Learners will have the opportunity to look at why it is important to keep customers informed of progress when complaints or queries have been raised, and the types of information they need from a customer to ensure they have the full details required to resolve the problem. Learners will also consider appropriate behaviour and attitude when dealing with dissatisfied customers and how to handle these situations effectively.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria		Unit amplification
1	Know the type of information that customers usually require	1.1	State the type of requests and queries customers are likely to have	<ul style="list-style-type: none"> □ <i>Queries:</i> e.g. relating to product or service price/features/benefits, trading times (opening/closing times, outside operating times/support), after-sales support, procedures for refunds and complaints, special offers □ <i>Requests:</i> e.g. further information relating to product or service obtained, changes to service provided, additional products or services
		1.2	State the difference between the features and benefits of a product/service	<ul style="list-style-type: none"> □ <i>Features and benefits:</i> definition of terms; examples of features and benefits of different types of product and service

Learning outcomes		Assessment criteria		Unit amplification
2	Know how to deal with customer requests and queries	2.1	Describe how to identify customers' requests and queries	<ul style="list-style-type: none"> □ <i>Identifying customer requests and queries:</i> types of questions (open-ended, close-ended); customer feedback (face to face, remote); body language (facial expressions, gestures); tone of voice
		2.2	Describe when, why and from whom to obtain information or help	<ul style="list-style-type: none"> □ <i>When to obtain information/help:</i> e.g. queries/requests are too complex, requests are outside own knowledge or authority □ <i>Reasons for getting help:</i> e.g. to avoid delays in service, to avoid customer problems and complaints, to satisfy customer needs, to protect organisation's reputation, to follow organisational procedures □ <i>Whom:</i> responsible person (manager, supervisor, colleague, specialist)
		2.3	Describe how to respond to requests and queries in a positive way	<ul style="list-style-type: none"> □ <i>Responding in a positive way:</i> responding willingly to requests, within organisational timescales; following organisational procedures; listening to customers' requests/queries; courteous and polite; checking understanding of details with customers (asking open-ended questions)
		2.4	State the importance of keeping customers informed about the actions on their requests or queries	<ul style="list-style-type: none"> □ <i>Importance:</i> reassurance for customers; good first impression; making the customer feel respected and valued; repeat business
		2.5	State how the use of 'frequently asked questions' can help in dealing with customer requests and queries	<ul style="list-style-type: none"> □ <i>Frequently asked questions (FAQs):</i> description, i.e. list of the most frequently asked questions, and the answers, about an organisation's products/services; availability (website, printed) □ <i>Use in dealing with requests and queries:</i> provision of accurate information to customers; consistency of responses to customers; responsiveness to customer requests and queries; self-service, e.g. customers can find the information themselves

Learning outcomes		Assessment criteria		Unit amplification
3	Know how to deal with routine customer problems	3.1	Describe how to recognise when customers are raising problems	<ul style="list-style-type: none"> □ <i>Routine customer problems:</i> returns; delivery errors; incorrect customer records; delays with goods □ <i>Recognising problems:</i> dissatisfied customers, e.g. complaints, returns; body language, e.g. closed posture, frowning; communication style, e.g. abrupt, formal, impolite; behaviour, e.g. aggressive
		3.2	Identify the information to request when asking customers for details of their problems	<ul style="list-style-type: none"> □ <i>Types of information:</i> customer personal details, e.g. name, address; details of problem, e.g. what happened, who was involved, when did it happen, what caused it to happen; what action the customer wishes to be taken to rectify problem
		3.3	Describe how to behave and communicate with customers who are dissatisfied	<ul style="list-style-type: none"> □ <i>Dissatisfied customers:</i> customers who are unhappy; when the service or product supplied by an organisation fails to meet customer needs and expectations □ <i>Behaviour:</i> personal behaviour, e.g. keep calm, be sympathetic, show understanding, avoid getting angry; take responsibility to resolve the problem; allow customers time to explain their problems; show respect; follow organisational procedure for dealing with problems □ <i>Communication:</i> professional and positive language (speed, tone, volume); active listening; positive body language (open, relaxed, respect personal space); follow organisation's procedures and apply policies
		3.4	State why it is important to check that customers are satisfied with the actions taken	<ul style="list-style-type: none"> □ <i>Importance:</i> customer satisfaction, i.e. customer is happy; acceptable resolution of problem (the problem has actually been resolved); check before recording the problem as being resolved; service recovery

Learning outcomes		Assessment criteria		Unit amplification
		3.5	State to whom and when problems should be referred	<ul style="list-style-type: none"> □ <i>Whom</i>: responsible person (manager, supervisor, colleague, specialist) □ <i>When</i>: non-routine customer problems, e.g. problems regarding product/service quality, customer requesting compensation, complaints; when level of authority required to resolve the problem is exceeded
		3.6	State the importance of keeping customers informed of the progress of resolving their problems	<ul style="list-style-type: none"> □ <i>Importance</i>: to keep the customer informed; informing them of who is dealing with the problem and the next steps; makes customers feel valued and happier

Information for tutors

Delivery

Learning outcome 1 could be delivered through the tutor giving a presentation to learners, which will generate class discussions focusing on the information customers require. Learners could also work in small groups or pairs to identify the types of information customers need in certain situations and feed back their findings to the whole class.

Learning outcome 2 could be delivered using relevant case studies from well-known customer service-based companies/retail outlets, as well as video clips, which would demonstrate how to deal with customer queries or requests in a consistent and effective manner.

Learning outcome 3 could be delivered using role play. Learners could be placed into small groups and given a series of routine customer problems that they need to deal with. These role-play scenarios could generate whole class discussion. Case studies could also be used from well-known customer service-based organisations that give details of how staff should deal with issues and queries from customers.

Assessment

The centre will devise and mark the assessment for this unit.

Assessment criterion 1.1 could be achieved by the learner writing a short report on the types of requests and queries customers are likely to have. As an alternative assessment method, learners could create a poster that identifies queries and issues from customers focusing on a particular area of customer service, for example retail.

Assessment criterion 1.2 could be achieved by the learner creating a table to distinguish between features and benefits of a product. This table could focus on the company identified in 1.1 and its products.

To achieve assessment criterion 2.1, learners could produce a booklet for new members of staff joining an organisation that focuses on how to deal with customers' requests and queries effectively. The booklet could contain advice and guidance on where to go for additional information or help if required (2.2), how to remain positive when dealing with requests and issues (2.3) and how to remain calm and keep within timescales. It should also contain advice and guidance on how to ensure actions are followed up (2.4) to ensure that the customer is totally satisfied with the service they have received. The booklet could also include reference to the frequently asked questions (FAQs) that the organisation will have for customers, clearly identifying where these can be found (2.5). Alternatively, learners could create their own FAQs for the booklet on the key issues on which they think an organisation will focus.

For assessment criterion 3.1, learners could write a short report on how they can recognise the signs of a customer problem or complaint. Learners should put their report into context and use the role-play scenarios or situations that they are familiar with.

Assessment criterion 3.2 could link to 3.1, where learners clearly identify the information they are going to need in order to anticipate a customer's issues or queries.

To achieve assessment criterion 3.3, learners could write a report identifying the behaviours that need to be displayed when dealing with customers who are not happy with the service received. This could be linked back to the role-play exercise or focus on work experience that a learner may have had.

Assessment criteria 3.4, 3.5 and 3.6 could be achieved by learners working in small groups to create a presentation that clearly identifies:

- the importance of checking with the customer when actions have been agreed and the implications if these actions are not agreed
- when to refer problems to a higher authority to ensure consistent customer service is given and problems are resolved at a higher level
- the importance of ensuring that customers know the progress of their query and are kept informed of the progress at all times.

This presentation should be at least four pages long. Groups could feed back to the whole class on completion of their presentation.

Suggested resources

Books

McManus S – *The Customer Service Pocket Book* (Management Pocket Books Ltd, 2013) ISBN 9781906610555

Watkinson M – *The Ten Principles Behind Great Customer Experiences* (FT Publishing International, 2013) ISBN 9780273775089

Websites

www.customerserviceexcellence.uk.com	Customer Service Excellence – home to the government's customer service standard
www.customerservicemanager.com	Information on valuable customer service skills
www.ico.org.uk	Information on freedom of information and data protection
www.instituteofcustomerservice.com	The Institute of Customer Service is the professional body for customer service
www.nationalcareersservice.direct.gov.uk	Information on different jobs including customer service
www.people1st.co.uk	The Sector Skills Council for retail
www.skillsyouneed.com	Customer service skills and information

Unit 6: Using Email

Unit reference number: Y/506/8825

Level: Entry 3

Credit value: 1

Guided learning hours: 10

Unit aim

This unit aims to enable learners to make the best use of email software to safely and securely send, receive and store messages.

The first part of the unit deals with how to compose and send email messages, focusing on how to stay safe and respect others, following guidelines and procedures. Learners will also send a file as an attachment to an email message.

The second part of the unit aims to develop learners' knowledge and skills in managing incoming email messages by reading and responding to them and understanding how to use basic tools to store them for future use.

The final part of the unit will introduce learners to common email problems and how to respond to them, as well as identifying where to get expert advice to solve a problem.

Essential resources

For this unit centres will need to have a LAN with email application software or access to web-based emailing software and access to the internet. Centres will need the facilities to enable learners to carry out the practical aspects of the unit as defined by the content and assessment criteria. Centres will also need a range of suitable software tools and equipment to support the cohort size undertaking the units.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria		Unit amplification
1	Be able to use email software tools to send and compose messages	1.1	Use software tools to compose email messages	□ <i>Compose email messages</i> : compose, e.g. enter text
		1.2	Attach a file to an email message	□ <i>Adding an attachment</i> : attach, e.g. file
		1.3	Send and receive email messages using appropriate tools	□ <i>Send and receive email messages</i> : send, e.g. to, from, cc, subject; reply; receive, e.g. check mail, new messages, subject header
		1.4	State how to stay safe and respect others when using email	□ <i>Stay safe and respect others</i> : e.g. private information, language
2	Be able to manage incoming email	2.1	Follow guidelines and procedures for using email	□ <i>Guidelines and procedures for using email</i> : set by employer or organisation, e.g. security, copyright, password protection
		2.2	State when to respond to email messages	□ <i>Responding to email</i> : priorities; information to send; who to send it to
		2.3	Read and respond to email messages	
		2.4	Store email messages appropriately for future use	□ <i>Store email</i> : e.g. personal folders, save drafts
3	Be able to respond to common problems when using email	3.1	Respond to common email problems	□ <i>Email problems</i> : full mailbox; unknown sources, e.g. spam, junk, chain-mails, 'phishing' viruses; rejected email messages
		3.2	Identify where to get expert advice to solve a problem	□ <i>Expert advice</i> : e.g. help menus, guidelines, websites, email responses

Information for tutors

Delivery

A practical approach to delivery is essential for this unit and should enable learners to develop their technical knowledge and skills. Much of the assessment evidence is likely to be produced during this process, and centres should consider what other supporting product evidence can be collected.

Assessment

The centre will devise and mark the assessment for this unit.

Where possible a holistic approach to teaching is suggested throughout this qualification. However, this unit is task based and could prove difficult to achieve over one set context. It is envisaged that this unit be taught through various topic areas of interest to the learners.

Therefore, assessment evidence will primarily come in the form of observations although class discussions, peer assessment and other written work may be effective. It is advised that a log of evidence recorded against each assessment criterion is kept by learners. Where the assessment criteria require learners to demonstrate actions connected with email use, the evidence should show that the relevant actions have been undertaken successfully on at least two occasions, and the assessor should produce observation records that have sufficient detail to show why the assessor decided that each learning outcome had been met. Any supporting evidence in the form of written materials, documents and learner notes should be retained as part of the assessment evidence to enable internal and external quality assurance processes to be conducted.

Suggested resources

Books

Dyzel B – *Outlook 2007 for Dummies* (John Wiley & Sons, 2006)
ISBN 9780470038307

Preppernau J and Cox J – *Microsoft® Office Outlook® 2007 Step by Step*
(Microsoft Press, 2007) ISBN 9780735623002

Websites

www.bbc.co.uk/schools/teachers/

www.howstuffworks.com

Unit 7: Produce a CV

Unit reference number: F/505/6930

Level: Entry 3

Credit value: 2

Guided learning hours: 20

Unit aim

The aim of this unit is to introduce learners to the kind of information needed to produce a CV and for learners to develop the skills to be able to produce a CV appropriate for a job application.

A CV is often the first impression a prospective employer will have of a job applicant and therefore it is important that it is well presented with no spelling mistakes or errors. In this unit, learners will understand the purpose of a CV and the types of information that should be included. They will examine the purpose of references and, using a template, produce a CV relevant to a specific job application ensuring that it is accurate and clear.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria		Unit amplification
1	Know the purpose of a CV	1.1	Outline why a CV might be used when applying for a job	<ul style="list-style-type: none"> □ <i>Purpose of CV:</i> to get an interview; to record facts about a person's skills, qualifications and experience; demonstrate suitability to a potential employer for a particular job; act as a memory jogger when completing application forms; record up-to-date and relevant information
2	Know information required in a CV	2.1	Identify core information needed to complete a CV	<ul style="list-style-type: none"> □ <i>Core information needed to complete a CV:</i> personal details, e.g. name, address, phone number, email address; career history with dates, starting with most recent job first; personal profile to present self and qualities; relevant achievements from previous jobs; qualifications and training from previous jobs; interests and any skills or teamwork relevant for the job; extra information, e.g. reasons for a career change or reasons for gaps in career history, e.g. caring duties; references; information to leave out of a CV
3	Know the purpose of a reference in a CV	3.1	Outline why a reference is needed in a CV	<ul style="list-style-type: none"> □ <i>Purpose of a reference:</i> to confirm facts stated in the CV; part of the job selection process; getting prior approval to use referees
		3.2	Identify suitable referees for a CV	<ul style="list-style-type: none"> □ <i>Suitable referees:</i> people who can comment positively on skills/qualities in relation to the job, e.g. teachers/tutors, previous employers □ <i>Unsuitable referees:</i> people who may not be best placed to vouch for your skills/qualities in relation to the job, e.g. family members, friends, someone who does not know you
4	Be able to produce a CV	4.1	Produce a CV appropriate for a job application using a template	<ul style="list-style-type: none"> □ <i>Produce a CV:</i> tailored to meet job being applied for; use ICT to produce a neat, accurate and professional looking CV; use of template; no more than two sides of a sheet of A4 paper; be positive and emphasise achievements, strengths and successes to make a good impression

Information for tutors

Delivery

Tutors could start delivery of this unit by discussing with learners what a CV is and why it is used when applying for a job. Tutors could provide examples of real CVs for learners to familiarise themselves with. Learners and tutors could discuss the format of these examples and the types of information required to complete a CV.

To encourage learner engagement it is important that the learner and tutor/line manager agree that the job application, whether simulated or real, is suitable in terms of the learner's interests, personal career situation, and abilities. Any associated job application information should reflect the level of the learner. Learners should be encouraged to spend some time thinking carefully through the details they want to include in the CV and can start by jotting down notes about previous jobs, skills, qualities, experience and interests. They can then decide which points are most important and keep sentences short or use bullet points under the template headings.

Tutors must stress the importance of being accurate and honest with the information provided in a CV, and ensure learners understand the consequences of giving false or exaggerated information. Discussions on how references are used to confirm abilities and suitability for a job could be followed by learners identifying examples of suitable people they could use for a reference. Learners should also be aware that it is good etiquette to ask for people's permission to act as a referee before including their details on a CV.

A question and answer session could help learners to understand the need to present their information in a way that is clear and legible. Learners also need to recognise the importance of spelling and grammar (and the need for legible handwriting, where it is used).

Assessment

The centre will devise and mark the assessment for this unit.

For 1.1, learners should outline two reasons why a CV might be used when applying for a job. Evidence could be presented in written format or through discussion with the tutor.

For 2.1, learners should identify core information needed to complete a CV. Learners may be guided in identifying relevant core information through group discussions, discussions with a tutor or from given information.

For 3.1, learners need to outline at least one reason why a reference is needed in a CV.

For 3.2, learners will need to identify two suitable referees for a CV.

For 4.1, learners need to produce a CV, with accurate information, appropriate for a job application. A template should be used to present the information, which needs to be clear and legible. Learners are not expected to prepare a CV without support and guidance from their tutor and may require support to understand what is and what is not relevant to include in their CV. The final CV must be prepared by learners themselves, although they will have practised this in advance and discussed and agreed the information with their tutor.

Suggested resources

Websites

www.alec.co.uk

www.nationalcareersservice.direct.gov.uk

Unit 8: Managing Own Learning

Unit reference number: T/501/7235

Level: Entry 3

Credit value: 3

Guided learning hours: 30

Unit aim

In this unit learners will discuss their own work skills in order to develop a realistic personal development plan. Learners will reflect on their own skills in order to identify areas for development, and they will identify sources of help and advice. They will then prepare a personal development plan with realistic targets.

In order to progress within the work environment, a learner must be able to identify what skills they have already acquired that are relevant to employment and what skills need to be developed. Learners will need to identify sources of help and advice to support the development of skills not acquired. This may include talking to employees within the business environment or researching relevant websites. Using the information gathered from the research undertaken learners will then be able to develop a personal development plan. It is anticipated that learners will need guidance to achieve this outcome successfully.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria		Unit amplification
1	Be able to identify own work skills	1.1	Carry out a self-assessment of own work skills	<ul style="list-style-type: none"> □ <i>Skills check</i>: self-assessment; awareness of life skills, e.g. organising activities for friends, family; awareness of interpersonal and communication skills; identifying strengths and weaknesses; importance of learning from mistakes; identifying skills gaps; feedback from others
2	Be able to identify areas for development	2.1	Identify areas for development	<ul style="list-style-type: none"> □ <i>Development opportunities</i>: work-based training; college-based training; on the job training; work shadowing; mentoring; own research; taking on new challenges
		2.2	List sources of help and advice	<ul style="list-style-type: none"> □ <i>Sources of help and advice</i>: in college – tutor, careers adviser; in work – supervisor, human resources adviser, colleagues; Learndirect
3	Be able to prepare a realistic personal development plan	3.1	With guidance, prepare a personal development plan	<ul style="list-style-type: none"> □ <i>Planning work</i>: work plans – discussing with supervisor/tutor, agreeing and amending, objectives, deadlines, timescales, prioritising, need for flexibility; revising plans – preventing problems, informing others of progress □ <i>Setting targets</i>: identifying targets, timeframe, priorities, standards, opportunities, training needed; how to measure achievement □ <i>Preparing personal development plan</i>: skills, knowledge and abilities; personal strengths and weaknesses; action points, completion times, extra information/training/resources required; checking progress

Information for tutors

Delivery

This unit may build on work that the learner has already carried out on records of achievement or during job interviews. However, the unit should be taught in the context of the vocational sector being studied, so that learners can explore their potential in the sector. Alternatively, if this unit is used for induction purposes, or as a taster, a number of sectors could be explored.

A key aim of this unit is to match individual strengths to sector-specific job, roles and/or ambitions. Learners should be encouraged to identify any administrative skills they already have. Any prior experience or knowledge of different types of administrative roles would be useful for learners to share with each other. The internet will also be a great source of information about careers and skills focus, but should be used carefully.

Although this unit is designed to allow learners freedom of choice it should be remembered that a key outcome is to reflect on personal strengths and weaknesses related to the business administration sector.

Learners could access careers advice from Learndirect (www.learndirect.co.uk) to help them begin their personal development plan. Understanding the need for goal setting and the difference between medium-term and short-term goals could be explored through a question and answer session.

Learners at this level may need support in identifying and setting targets for themselves for learning outcome 3. This may be achieved through one-to-one discussions or tutorial.

Assessment

The centre will devise and mark the assessment for this unit.

The assessment criteria for this unit may be combined into one assignment task as a personal development plan for the learner. This may take the form of a loose-leaf folder.

1.1 could be met through group discussions or one-to-one discussions with the tutor in order for learners to identify their own work skills.

To meet 2.1 and 2.2, learners will need to provide evidence of their research into their own areas for development. This may be supplemented with leaflets, downloads from websites, documentation from tutorials/discussions with tutors or careers advisers.

To meet 3.1, learners should prepare a personal development plan. Learners need to discuss their plan and receive guidance. This should preferably be with a careers professional such as a careers adviser, although if this is impractical, one-to-one discussion with the learner's tutor is acceptable. The plan should identify one medium-term and two short-term goals. These goals should be realistic.

Suggested resources

Websites

www.skillsfca.org

Council for Administration

www.direct.gov.uk/en/youngpeople/index.htm

Advice for 13-19 age group, including advice on learning and careers

www.learndirect.co.uk

Advice on careers and skills development

13 Further information and useful publications

To get in touch with us visit our 'Contact us' pages:

- Edexcel, BTEC and Pearson Work Based Learning contact details: qualifications.pearson.com/en/support/contact-us.html
- books, software and online resources for UK schools and colleges: www.pearsonschoolsandfecolleges.co.uk

Key publications:

- *Adjustments for candidates with disabilities and learning difficulties, Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications* (Joint Council for Qualifications (JCQ))
- *Supplementary guidance for reasonable adjustments and special consideration in vocational internally assessed units* (Pearson)
- *General and Vocational qualifications, Suspected Malpractice in Examination and Assessments: Policies and Procedures* (JCQ)
- *Equality Policy* (Pearson)
- *Recognition of Prior Learning Policy and Process* (Pearson)
- *UK Information Manual* (Pearson)
- *BTEC UK Quality Assurance Centre Handbook*

All of these publications are available on our website.

Publications on the quality assurance of BTEC qualifications are also available on our website.

Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please visit our website.

Additional resources

If you need further learning and teaching materials to support planning and delivery for your learners, there is a wide range of BTEC resources available.

Any publisher can seek endorsement for their resources and, if they are successful, we will list their BTEC resources on our website.

14 Professional development and training

Pearson supports UK and international customers with training related to BTEC qualifications. This support is available through a choice of training options offered on our website.

The support we offer focuses on a range of issues, such as:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing learner-centred learning and teaching approaches
- building in effective and efficient quality assurance systems.

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Regional support: our team of Curriculum Development Managers and Curriculum Support Consultants, based around the country, are responsible for providing advice and support in centres. They can help you with planning and curriculum developments.

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Your Pearson support team

Whether you want to talk to a sector specialist, browse online or submit your query for an individual response, there's someone in our Pearson support team to help you whenever – and however – you need:

- **Subject Advisors:** find out more about our subject advisor team – immediate, reliable support from a fellow subject expert
- **Ask the Expert:** submit your question online to our Ask the Expert online service and we will make sure your query is handled by a subject specialist.

Please visit our website at qualifications.pearson.com/en/support/contact-us.html

Annexe A

Mapping with National Occupational Standards

The grid below maps the knowledge covered in the Pearson BTEC Entry Level Award and Certificate in Customer Service (Entry 3) against the underpinning knowledge of the National Occupational Standards in Customer Service. Centres can use this mapping when planning holistic delivery and assessment activities.

KEY

indicates partial coverage of knowledge in the NOS unit

A blank space indicates no coverage of the knowledge

		BTEC Specialist units						
		Unit 1	Unit 2	Unit 3	Unit 4	Unit 5	Unit 6	Unit 7
NOS								
CFACSA1	Maintain a positive and customer-friendly attitude	#						
CFACSA10	Deal with customers face to face	#						
CFACSA11	Deal with incoming telephone calls from customers	#						
CFACSA12	Make telephone calls to customers	#						
CFACSA13	Deal with customers in writing or electronically	#					#	
CFACSA2	Behave in a way that gives a good customer service impression	#						
CFACSA3	Communicate effectively with customers	#						
CFACSA4	Give customers a positive impression of yourself and your organisation	#						
CFACSB1	Do your job in a customer-friendly way	#	#	#				

NOS		BTEC Specialist units						
		Unit 1	Unit 2	Unit 3	Unit 4	Unit 5	Unit 6	Unit 7
CFACSB12	Maintain and develop a healthy and safe customer service environment			#				
CFACSC1	Recognise and deal with customer queries, requests and problems					#		
CFACSF1	Communicate in a customer service environment		#					
CFACSF2	Deliver customer service within the rules		#					

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