

# **Pearson**

# **BTEC Level 2 Certificate and Diploma for Customer Service Practitioners**

## **Specification**

BTEC Specialist qualifications

First teaching June 2019

## **Edexcel, BTEC and LCCI qualifications**

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# 1 Introducing BTEC Specialist qualifications

## What are BTEC Specialist qualifications?

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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.

BTEC Specialist qualifications put learning into the context of the world of work, giving learners the opportunity to apply their research, skills and knowledge in relevant and realistic work contexts. This applied, practical approach means learners develop the knowledge, understanding and skills they need for career progression or further study. As such, these qualifications are well suited to support the delivery of the Apprenticeship Standards.

The qualifications may be offered as full-time or part-time courses in schools, colleges and training centres and through employers.

## Sizes of BTEC Specialist qualifications

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

In addition to guided learning, other required learning directed by tutors or assessors includes 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 have a credit value – equal to one tenth of the TQT, rounded to the nearest whole number.

TQT and credit values are assigned after consultation with employers and training providers delivering the qualifications.

BTEC Specialist qualifications are generally 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 Level 2 Certificate for Customer Service Practitioners
Qualification Number (QN)	603/4675/9
Regulation start date	28/05/2019
Operational start date	01/06/2019
Approved age ranges	16–18 19+ Please note that sector-specific requirements or regulations may prevent learners of a particular age from embarking on this qualification. Please see <i>Section 6 Access and recruitment</i> .
Total qualification time (TQT)	216 hours
Guided learning hours (GLH)	129
Assessment	Internal assessment
Grading information	The qualification and units are at a Pass grade.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must also follow the information in our document <i>A guide to recruiting learners onto Pearson qualifications</i> (see <i>Section 6 Access and recruitment</i> ).
Funding	Qualifications eligible and funded for post-16-year-olds can be found on the funding Hub. The Apprenticeship funding rules can be found at <a href="http://www.gov.uk">www.gov.uk</a>

Qualification title	Pearson BTEC Level 2 Diploma for Customer Service Practitioners
Qualification Number (QN)	603/4676/0
Regulation start date	28/05/2019
Operational start date	01/06/2019
Approved age ranges	16–18 19+ Please note that sector-specific requirements or regulations may prevent learners of a particular age from embarking on this qualification. Please see <i>Section 6 Access and recruitment</i> .
Total qualification time (TQT)	370 hours
Guided learning hours (GLH)	219
Assessment	Internal assessment.
Grading information	The qualification and units are at a Pass grade.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. Learners will need to be on an apprenticeship programme, or be otherwise employed in a customer service role.  Centres must also follow the information in our document <i>A guide to recruiting learners onto Pearson qualifications</i> (see <i>Section 6 Access and recruitment</i> ).
Funding	Qualifications eligible and funded for post-16-year-olds can be found on the funding Hub.  The Apprenticeship funding rules can be found at <a href="http://www.gov.uk">www.gov.uk</a>

Centres will need to use the Qualification Number (QN) when they seek public funding for their learners. The qualification title, unit titles and QN will appear on each learner's final certificate. Centres should tell learners this when recruiting them and registering them with Pearson. There is more information about certification in our *UK Information Manual*, available on our website, [qualifications.pearson.com](http://qualifications.pearson.com)

## 3 Qualification purpose

### Qualifications objectives

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The Pearson BTEC Level 2 Certificate and Diploma for Customer Service Practitioners are for learners who are working in, or who are intending to work in, a customer service role.

The Pearson BTEC Level 2 Certificate for Customer Service Practitioners supports the off-the-job training and development of learners on the Customer Service Practitioner Apprenticeship programme. The qualification will help learners to develop and apply the technical and behavioural knowledge and understanding required to become competent and successful in a customer service job role.

The qualification is also suitable for non-apprenticeship learners who want to develop technical knowledge to prepare for employment or to progress their career by achieving a recognised qualification based on current, employer-recognised standards.

The qualification gives learners the opportunity to:

- develop the technical knowledge and understanding that underpins competence in a customer service job role
- learn about a range of transferable skills and professional attributes that support successful performance in an customer service job role
- achieve a nationally recognised Level 2 qualification
- develop confidence and readiness for the apprenticeship end-point assessment.

The Pearson BTEC Level 2 Diploma for Customer Service Practitioners extends the learning from the Certificate-size qualification to include the development of practical work-based skills and behaviours. The qualification is designed to support both off-the-job and on-the-job training and development of learners on the Customer Service Practitioner Apprenticeship programme. It helps learners to develop and demonstrate technical knowledge and understanding, skills and behaviours to become successful in a customer service role.

The qualification is also suitable for non-apprenticeship learners in employment who want to upskill or progress their career by achieving a recognised qualification based on current, employer-recognised standards.

The qualification gives learners the opportunity to:

- develop the technical knowledge and understanding that underpins competence in a customer service job role
- develop and demonstrate a range of transferable skills and professional behaviours and attributes in the work environment
- develop and demonstrate a range of technical skills to carry out their job role successfully in the work environment
- achieve a nationally recognised Level 2 qualification
- develop confidence and readiness for the apprenticeship end-point assessment.
- develop personal growth and engagement in learning.

## Apprenticeships

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The qualifications are not a mandatory requirement of the Customer Service Practitioner Apprenticeship. However, as they are aligned to the Apprenticeship Standard, they provide structure for the:

- off-the-job training element of the Apprenticeship (Certificate)
- full on-programme training element of the Apprenticeship (Diploma)

and builds the foundation for learners to develop occupational competence.

*Annexe A* shows how the knowledge, skills and behaviours (KSBs) from the Apprenticeship Standard are covered in the qualifications.

## Progression opportunities

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Learners who achieve the Certificate or Diploma qualification and who have met the specified on-programme requirements of the Apprenticeship Standard, can progress to end-point assessment and achieve the full apprenticeship certification that confirms competency in a customer service job role.

With further training and development, learners can progress to more senior or complex job roles, including customer service specialist roles and management.

Alternatively, learners who have achieved the Certificate or Diploma qualification but who have not completed the full apprenticeship requirements could progress to job roles such as Customer Relationship Manager, Customer Support Officer, Customer Service Team Leader and Customer Service Supervisor, or to other qualifications in customer service and leadership and management.

## 4 Qualification structures

### Pearson BTEC Level 2 Certificate for Customer Service Practitioners

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

Minimum number of units that must be achieved	4
Minimum number of guided learning hours that must be achieved	129

Unit number	Mandatory units	Level	Guided Learning Hours
1	Understanding Your Employer Organisation	2	30
2	Understanding How to Deliver High-Quality Customer Service	2	34
3	Understanding Personal Effectiveness in a Customer Service Work Environment	2	35
4	Understanding Communication in a Customer Service Environment	2	30

## Pearson BTEC Level 2 Diploma for Customer Service Practitioners

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

Minimum number of units that must be achieved	8
Minimum number of guided learning hours that must be achieved	219

Unit number	Mandatory units	Level	Guided Learning Hours
1	Understanding Your Employer Organisation	2	30
2	Understanding How to Deliver High-Quality Customer Service	2	34
3	Understanding Personal Effectiveness in a Customer Service Work Environment	2	35
4	Understanding Communication in a Customer Service Environment	2	30
5	Communicating with Customers Effectively	2	24
6	Delivering High-Quality Customer Service	2	23
7	Handling Customer Conflict and Challenge	2	22
8	Managing Personal Effectiveness in a Customer Service Job Role	2	21

## 5 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(s).

- Centres must have appropriate physical resources (for example IT, learning materials, teaching rooms) to support the delivery and assessment of the qualification(s).
- Staff involved in the assessment process (assessors and internal verifiers) must have relevant expertise and occupational experience. This includes having:
  - current occupational experience (within the last three years) appropriate to the level and breadth of subject areas of the qualification units being assessed
  - substantial knowledge and understanding of the subject areas appropriate to the level, breadth and content of the qualification(s) units. This may be evidenced through having a relevant qualification that is at an equivalent or higher level than the level of the qualifications being assessed
  - a relevant qualification in assessment and/or internal quality assurance or current experience (within the last three years) of assessing and/or internal verification appropriate and relevant to the level and subject area of the qualifications units
  - evidence of continuing professional development (CPD) which may include the achievement of qualifications relevant to the areas being assessed.
- There must be systems in place that ensure CPD for staff delivering the qualification(s).
- Centres must have in place appropriate health and safety policies that relate to the use of equipment by learners.
- Centres must have in place robust internal verification systems and procedures to ensure the quality and authenticity of learners' work as well as the accuracy and consistency of assessment decisions between assessors operating at the centre. For information on the requirements for implementing assessment processes in centres, please refer to our work-based learning quality assurance handbooks, available on our website.
- 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 6 Access and recruitment*. For full details of the Equality Act 2010 visit [www.legislation.gov.uk](http://www.legislation.gov.uk)

## 6 Access and recruitment

Our policy on 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 barriers that restrict access and progression
- there should be equal opportunities for all wishing to access the qualifications.

Centres must ensure that their learner recruitment process is conducted with integrity. This includes ensuring that applicants have appropriate information and advice about the qualification to ensure that it will meet their needs.

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

We refer centres to the Pearson *Equality, diversity and inclusion policy*, which can be found in the support section of our website.

### Prior knowledge, skills and understanding

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No prior knowledge, understanding, skills or qualifications are required for learners to register for the qualifications. For the Diploma-size qualification, learners will need to be on an apprenticeship programme or be otherwise employed in a customer service role.

### Access to qualifications for learners with disabilities or specific needs

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Equality and fairness are central to our work. Pearson's *Equality, diversity and inclusion policy* requires all learners to have equal opportunity to access our qualifications and assessments and that our qualifications are awarded in a way that is fair to every learner.

We are committed to making sure that:

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

For learners with disabilities and specific needs, the assessment of their potential to achieve the qualification must identify, where appropriate, the support that will be made available to them during delivery and assessment of the qualification. Please see *Section 8 Assessment* for information on reasonable adjustments and special consideration.

## 7 Programme delivery

Centres are free to offer these qualifications using any mode of delivery that meets learners' and employers' needs. It is recommended that centres make use of a wide range of training delivery methods, including direct instruction in classrooms, simulated demonstrations, research or applied projects, e-learning, directed self-study, field visits and role play. 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.

Centres must adhere to the Pearson policies that apply to the different models of delivery. Our document, *Collaborative and consortium arrangements for the delivery of vocational qualifications policy* is available on our website.

As good practice, those planning the programme should aim to enhance the vocational nature of the qualification by:

- spending time with employers to better understand their organisational requirements and the methods of training that are most suitable, taking into consideration their available resources and working patterns
- collaborating with employers to ensure that learners have opportunities in the workplace to implement the knowledge and skills developed through the training programme
- developing up-to-date and relevant teaching materials that make use of scenarios relevant to the sector and relevant occupation
- giving learners the opportunity to apply their learning in realistic practical activities
- having regular meetings with employers to discuss learner progress, providing feedback and agreeing how any issues will be resolved
- developing projects or assessments with input from employers
- using 'expert witness' reports from employers to support assessment
- making full use of the variety of experience of work and life that learners bring to the programme
- planning opportunities for the development and practising of skills on the job. On-the-job training presents an excellent opportunity to develop the learner's routine expertise, resourcefulness, craft skills and business-like attitude. It is therefore important that there is intentional structuring of practice and guidance to supplement the learning and development provided through engagement in everyday work activities. Learners need to have structured time to learn and practise their skills separately from their everyday work activities. Teaching and learning methods, such as coaching, mentoring, shadowing, reflective practice, collaboration and consultation, could be used in this structured on-the-job learning.

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

## 8 Assessment

The table below gives a summary of the assessment methods used in the qualification(s).

Units	Assessment method
All units	Internal assessment (centre-devised assessments)

In administering internal assessments, centres need to be aware of the specific procedures and policies that apply to, for example, registration, entries and results. More information can be found in our *UK Information Manual*, available on our website.

### Language of assessment

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Assessments for internally-assessed units are in English only.

A learner taking the qualification(s) may be assessed in British or Irish Sign Language where it is permitted for the purpose of reasonable adjustment.

Further information on the use of language in qualifications is available in our *Use of languages in qualifications policy* document, available on our website.

For further information on access arrangements, please refer to *Reasonable adjustments to assessments* later in this section.

## Internal assessment – knowledge units

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All knowledge units in these qualifications are internally assessed and subject to external standards verification. This means that centres set and mark the final summative assessment for each unit using the examples and support that Pearson provides. Centres need to be approved, if they are not already, to offer the qualifications before conducting assessments. *Section 10 Centre recognition and approval* gives information on approval for offering these qualifications.

## Assessment through assignments

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For internally-assessed units, the format of assessment is an assignment taken after the content of the unit, or part of the unit if several assignments are used, has been delivered. An assignment may take a variety of forms, including practical and written. An assignment is a distinct activity, completed independently by learners, that is separate from teaching, practice, exploration and other activities that learners complete with direction from tutors and assessors.

An assignment is issued to learners as an assignment brief with a defined start date, a completion date and clear requirements for the evidence that they need to provide.

Assignments can be divided into tasks and may require several forms of evidence. A valid assignment will enable a clear and formal assessment outcome, based on the assessment criteria.

## Designing effective assignments

To ensure that final assessment decisions meet the required standard, assignments must be fit for purpose as a tool for measuring learning against the defined content and assessment criteria. Centres should make sure that assignments enable learners to produce valid, sufficient, authentic and appropriate evidence that relates directly to the specified criteria within the context of the learning outcomes and unit content.

An assignment that is fit for purpose and suitably controlled is one in which:

- the tasks that the learner is asked to complete provide evidence for a learning outcome that can be assessed using the assessment criteria
- the time allowed for the assignment is clearly defined and consistent with what is being assessed
- the centre has the required resources for all learners to complete the assignment fully and fairly
- the evidence generated will be authentic and individual to the learner
- the evidence can be documented to show that assessment and verification have been carried out correctly.

Recommended assignments are provided in the *Essential information for tutors and assessors* section of each unit. In designing assignments, centres need to work within the structure of the recommended assignments. They need to consider the following points when developing their assignment briefs:

- Centres may choose to combine all or parts of different units into single assignments provided that all units and all their associated learning outcomes are fully addressed in the programme overall. If this approach is taken, centres need to make sure that learners are fully prepared so that they can provide all the required evidence for assessment, and that centres are able to track achievement in the records.
- A learning outcome must always be assessed as a whole and should not be split into two or more assignments.
- The assignment must be targeted to the learning outcomes but the learning outcomes and their associated criteria are not tasks in themselves. Criteria are expressed in terms of the outcome shown in the evidence.
- Centres do not have to follow the order of the learning outcomes of a unit in developing assignments but later learning outcomes often require learners to apply the content of earlier learning outcomes, and they may require learners to draw their learning together.
- As assignments provide the final assessment, they will draw on the specified range of teaching content for the learning outcomes. The specified content is compulsory for teaching and learning. The evidence for assessment need not cover every aspect of the teaching content as learners will normally be given particular examples, case studies or contexts in their assignments. For example, if a learner is carrying out research on their employer organisation, then they will address all the relevant range of content that applies in that instance.

## **Providing an assignment brief**

A good assignment brief is one that, through providing challenging and realistic tasks, motivates learners to give appropriate evidence of what they have learned. An assignment brief should include:

- a vocational scenario, context or application for the tasks to be completed
- clear instructions to the learner about what they are required to do – normally set out through a series of tasks
- an audience or purpose for which the evidence is being provided.

## Forms of evidence

Centres may use a variety of forms of evidence, as long as the evidence is suited to the type of learning outcome being assessed. For some units, practical demonstration of skills is necessary, while for others, learners will need to demonstrate their knowledge and understanding. The units give information on suitable forms of evidence.

Centres may choose to use suitable forms for evidence that are different from those proposed. Overall, learners should be assessed using varied forms of evidence.

Some of the forms of evidence include:

- written tasks or reports
- projects
- time-constrained simulated activities with observation records and supporting evidence
- observation and recordings of practical tasks or performance in the workplace
- sketchbooks, work logbooks, reflective journals, workbooks
- presentations with assessor questioning
- witness testimony.

The form(s) of evidence selected must:

- allow the learner to provide all the evidence required for the learning outcomes and the associated assessment criteria
- allow the learner to produce evidence that is their own independent work
- allow a verifier to independently reassess the learner to check the assessor's decisions.

For example, when using performance evidence, centres need to think about how supporting evidence can be captured through preparation notes, reflective accounts, logbook records, recordings, photographs or task sheets.

Centres need to take particular care that learners are enabled to produce independent work. For example, if learners are asked to use real examples, then best practice would be to encourage them to use examples of their own experiences.

For information on the requirements for implementing assessment processes in centres, please refer to our work-based learning quality assurance handbooks, available on our website.

### **Authenticity of learner work**

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

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

Assessors must complete a declaration that:

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

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

During assessment, an assessor may suspect that some or all of the evidence from a learner is not authentic. The assessor must then take appropriate action using the centre's policies for malpractice. More information is given later in this section.

## **Making assessment decisions using unit-based criteria**

Assessment decisions for the qualification(s) are based on the specific criteria given in each unit.

Assessors make judgements using the assessment criteria and must show how they have reached their decisions in the assessment records. The assessor needs to make a judgement against each criterion that evidence is present and sufficiently comprehensive.

For example, the inclusion of a concluding section may be insufficient to satisfy a criterion requiring 'evaluation'.

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

- the *Essential information for tutors and assessors* section of each unit, which gives further information on the requirements to meet the assessment criteria
- the centre's Internal Verifier and assessment team's collective experience supported by the information provided by Pearson.

When a learner has completed the assessment for a unit, the assessor will give an assessment outcome for the unit. To achieve a Pass, a learner must have satisfied all the assessment criteria for the learning outcomes, showing appropriate coverage of the unit content and therefore attainment at the stated level of the qualification. The award of a Pass is a defined level of performance and cannot be given solely on the basis of a learner completing assignments. Learners who do not satisfy the assessment criteria for the units should be reported as Unclassified.

## **Dealing with late completion of assignments**

Learners must have a clear understanding of the centre's policy on completing assignments by the stated deadlines. Learners may be given authorised extensions for legitimate reasons, such as illness at the time of submission, in line with centre policies.

For assessment to be fair, it is important that learners are all assessed in the same way and that some learners are not advantaged by having additional time or the opportunity to learn from others.

If a late completion is accepted, then the assignment should be assessed normally using the relevant assessment criteria.

## **Issuing assessment decisions and feedback**

Once the assessor has completed the assessment process for an assignment, the outcome is a formal assessment decision. This is recorded formally and reported to learners.

The information given to the learner:

- must show the formal decision and how it has been reached, indicating how or where criteria have been met
- may show why attainment against criteria has not been demonstrated
- must not provide feedback on how to improve evidence
- must be validated by an internal verifier before it is given to the learner.

## **Resubmissions and retakes**

Learners who do not successfully pass an assignment are allowed to resubmit evidence for the assignment or to retake another assignment. As a matter of best practice, it is recommended that centres apply the BTEC Firsts and Nationals retake and resubmission rules; however, as these rules are not mandatory for BTEC Specialist programmes at Entry Level to Level 3, they do not need to be applied.

## Internal assessment – skills units

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All skills units in the Diploma qualification are assessed through an internally and externally quality-assured portfolio made up of evidence gathered during the course of the learner's work. Each skill unit has specified learning outcomes and assessment criteria. To pass each skills unit the learner must:

- achieve all the specified learning outcomes
- satisfy all the assessment criteria by providing sufficient and valid evidence for each criterion
- prove that the evidence is their own.

The learner must have an assessment record that identifies the assessment criteria that have been met. The assessment record should be cross-referenced to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment. Suitable centre documentation should be used to form an assessment record.

### Forms of evidence

To achieve a skills unit, the learner must gather evidence showing that they have met the required standard specified in the assessment criteria and Pearson's quality assurance arrangements (see *Section 10 Centre recognition and approval*).

- The evidence for the skills units can take a variety of forms as indicated below:
- direct observation of the learner's performance by their assessor (O)
- outcomes from oral or written questioning (Q&A)
- products of the learner's work (P)
- personal statements and/or reflective accounts (RA)
- professional discussion (PD)
- authentic statements/witness testimony (WT)
- simulation (S) where a real-work context doesn't provide the opportunity for assessment, for example dealing with issues, problems or complaints
- expert witness testimony (EWT).

Learners can use the abbreviations in their portfolios for cross-referencing purposes. Learners must provide evidence of their achievement of the knowledge-based learning outcomes and the associated assessment criteria in skills units – achievement of these cannot be inferred from performance.

Centres must ensure that the assessment methods used are appropriate for the specific learning outcomes and assessment criteria. Guidance may need to be given to learners before the assessment is conducted, to clarify the requirements of different command verbs. This will ensure that evidence provided has sufficient breadth and depth to meet the assessment requirements.

Learners can use one piece of evidence to prove their knowledge, skills and understanding across different assessment criteria and/or across different units. It is not necessary for learners to have each assessment criterion assessed separately. They should be encouraged to reference evidence to the relevant assessment criteria. However, the evidence provided for each unit must reference clearly the unit that is being assessed. Evidence must be available to the assessor, the internal verifier and the Pearson standards verifier.

Any specific evidence requirements for a unit are given in the unit's *Assessment* section. Further guidance on the requirements for centre quality assurance and internal verification processes is available on our website at [qualifications.pearson.com](http://qualifications.pearson.com)

## Administrative arrangements for internal assessment

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### Records

Centres are required to retain records of assessment for each learner. Records should include assessments taken, decisions reached and any adjustments or appeals. Further information can be found in our *UK Information Manual*. We may ask to audit centre records, so they must be retained as specified.

### Reasonable adjustments to assessments

Centres are able to make adjustments to assessments, to take account of the needs of individual learners, in line with the guidance given in the Pearson document *Guidance for reasonable adjustments and special consideration in vocational internally assessed units*. In most instances, adjustments can be achieved by following the guidance, for example allowing the use of assistive technology or adjusting the format of the evidence.

We can advise you if you are uncertain as to whether an adjustment is fair and reasonable. Any reasonable adjustment must reflect the normal learning or working practice of a learner in a centre or a learner working in the occupational area.

Further information on access arrangements can be found in the Joint Council for Qualifications (JCQ) document *Access arrangements and reasonable adjustments*.

Both documents can be found on the policy page of our website.

### Special consideration

Centres must operate special consideration in line with the guidance given in the Pearson document *Guidance for reasonable adjustments and special consideration in vocational internally assessed units*. Special consideration may not be applicable in instances where:

- assessment requires the demonstration of practical competence
- criteria have to be met fully
- units/qualifications confer licence to practice.

Centres cannot apply their own special consideration; applications for special consideration must be made to Pearson and can be made on a case-by-case basis only.

A separate application must be made for each learner. Certification claims must not be made until the outcome of the application has been received.

Further information on special consideration can be found in the JCQ document *A guide to the special consideration process*.

Both of the documents mentioned above can be found on our website.

## Appeals against assessment

Centres must have a policy for dealing with appeals from learners. Appeals may relate to assessment decisions being incorrect or assessment not being conducted fairly. The first step in such a policy is a consideration of the evidence by a lead internal verifier or other member of the programme team. The assessment plan should allow time for potential appeals after learners have been given assessment decisions.

Centres must document all learner appeals and their resolutions. Further information on the appeals process can be found in the document *Enquiries and appeals about Pearson vocational qualifications and end point assessment policy* available on our website.

## Dealing with malpractice in assessment

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

Pearson does not tolerate actual or attempted malpractice by learners, centre staff or centres in connection with Pearson qualifications. Pearson may impose penalties and/or sanctions on learners, centre staff or centres where malpractice or attempted malpractice has been proven.

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

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

### Internal assessment

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

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

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

### Learner malpractice

The head of centre is required to report incidents of suspected learner malpractice that occur during Pearson examinations. We ask centres to complete JCQ Form M1 ([www.jcq.org.uk/malpractice](http://www.jcq.org.uk/malpractice)) and email it with any accompanying documents (signed statements from the learner, invigilator, copies of evidence, etc) to the Investigations Processing team at [candidatemalpractice@pearson.com](mailto:candidatemalpractice@pearson.com).

The responsibility for determining appropriate sanctions or penalties to be imposed on learners lies with Pearson.

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

## **Teacher/centre malpractice**

The head of centre is required to inform Pearson's Investigations team of any incident of suspected malpractice by centre staff, before any investigation is undertaken. The head of centre is requested to inform the Investigations team by submitting a JCQ M2(a) form (downloadable from [www.jcq.org.uk/malpractice](http://www.jcq.org.uk/malpractice)) with supporting documentation to [pqsmalpractice@pearson.com](mailto:pqsmalpractice@pearson.com). Where Pearson receives allegations of malpractice from other sources (for example Pearson staff, anonymous informants), the Investigations team will conduct the investigation directly or may ask the head of centre to assist.

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

Heads of centres/principals/chief executive officers or their nominees are required to inform learners and centre staff suspected of malpractice of their responsibilities and rights, please see 6.15 of the JCQ document *Suspected malpractice in examinations and assessments – Policies and procedures*.

Pearson reserves the right in cases of suspected malpractice to withhold the issuing of results/certificates while an investigation is in progress. Depending on the outcome of the investigation, results and/or certificates may not be released or they may be withheld.

We reserve the right to withhold certification when undertaking investigations, audits and quality assurances processes. You will be notified within a reasonable period of time if this occurs.

## Sanctions and appeals

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

Where there is evidence of learner malpractice, penalties may be imposed such as:

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

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

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

The centre will be notified if any of these apply.

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

## 9 Recognising prior learning and achievement

### Recognition of Prior Learning

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Recognition of Prior Learning (RPL) is a method of assessment 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.

## 10 Centre recognition and approval

Centres that have not previously offered BTEC Specialist 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

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All centres are required to enter into an approval agreement with Pearson, in which the head of centre or principal agrees to meet all the requirements of the qualification specification and to comply with the policies, procedures, codes of practice and regulations of Pearson and relevant regulatory bodies. If centres do not comply with the agreement, this could result in the suspension of certification or withdrawal of centre or qualification approval.

# 11 Quality assurance of centres

Quality assurance is at the heart of vocational qualifications and apprenticeships.

The centre assesses BTEC Specialist qualifications and will use quality assurance to make sure that their managers, internal verifiers and assessors are standardised and supported. This also ensures learners are given appropriate opportunities that lead to valid and accurate assessment outcomes.

Pearson uses external quality assurance processes to verify that assessment, internal quality assurance and evidence of achievement meet nationally defined standards.

Our processes enable us to recognise good practice, effectively manage risk and support centres to safeguard certification and quality standards.

Our Standards Verifiers provide advice and guidance to enable centres to hold accurate assessment records and assess learners appropriately, consistently and fairly.

For the qualification in this specification, the Pearson quality assurance model will consist of the processes below:

Centres will receive at least one visit from our Standards Verifier, followed by ongoing support and development. This may result in more visits or remote support, as required to complete standards verification. The exact frequency and duration of Standards Verifier visits/remote sampling will reflect the level of risk associated with a programme, taking account of the:

- number of assessment sites
- number and throughput of learners
- number and turnover of assessors
- number and turnover of internal verifiers
- amount of previous experience of delivery.

If a centre is offering a BTEC Specialist qualification alongside other qualifications related to a similar Apprenticeship Standard, wherever possible, we will allocate the same Standards Verifier for both qualifications.

For further details please see the following handbooks available on our website:

- Pearson Centre Guide to Quality Assurance for NVQ/SVQ and Competence-based qualifications
- Pearson Delivery Guidance and Quality Assurance Requirements for NVQ/SVQ and Competence-based qualifications.

Following registration, centres will be given further quality assurance and sampling guidance.

# 12 Units

Each unit in the specification is set out a similar way. This section explains how the units are structured. It is important that all tutors, assessors, internal verifiers and other staff responsible for the programme review this section.

Units have the following sections.

## **Unit number**

The number is in a sequence in the specification. Where a specification has more than one qualification, numbers may not be sequential for an individual qualification.

## **Unit title**

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

## **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.

## **Unit type**

This indicates whether the unit is knowledge or skills-based.

## **Guided learning hours (GLH)**

This indicates the number of hours of activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study. Units may vary in size.

Pearson has consulted with users of the qualification and has assigned a number of hours to this activity for each unit.

## **Unit introduction**

This is designed with learners in mind. It indicates why the unit is important, what will be learned and how the learning might be applied in the workplace.

## **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

The assessment criteria specify the standard the learner is required to meet to achieve a learning outcome. A full glossary of terms used is given in *Annexe B*. All assessors need to understand our expectations of the terms used.

## Unit content

This section sets out the required teaching content of the unit 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 it is designed to support apprenticeships, the unit content is informed by the knowledge, understanding, skills and behaviour requirements of the relevant Apprenticeship Standard.

## Relationship between unit content and assessment criteria

Content is compulsory except when shown as 'e.g.'. Although it is not a requirement that all of the content is assessed, learners should be given the opportunity to cover it all.

Learners should be asked to complete summative assessment only after the teaching content for the unit or learning outcomes has been covered.

## Legislation

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

## Essential information for tutors and assessors

This section gives information to support delivery and the implementation of assessment. It contains the following subsections.

- *Essential resources* – 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.
- *Assessment* – for the knowledge units, it provides recommended assignments and suitable sources of evidence for each learning outcome. This section also gives information about the standard and quality of evidence expected for learners to achieve the learning outcome and pass each assignment. It is important that the information is used carefully, alongside the assessment criteria.



# Unit 1: Understanding Your Employer Organisation

<b>Level:</b>	<b>2</b>
<b>Unit type:</b>	<b>Knowledge</b>
<b>Guided learning hours:</b>	<b>30</b>

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## Unit introduction

All customer service employees need to understand the purpose, aims and values of their organisation, as well as the sector in which it operates. They also need to know about the legislation, regulations and organisational policies and procedures relating to their role, and how they can impact customer service delivery.

In this unit, you will learn about the sector in which your organisation operates. You will explore your organisation's purpose and aims, and how they relate to its sector. You will also explore your organisation's brand promise and core values, and how they link to the service culture.

You will learn about the various internal policies and procedures that relate to your customer service role, including how they can impact on customer service delivery.

Finally, you will learn about legislation, including consumer protection, health and safety, data protection and equality. You will gain understanding of the responsibilities of the employer and employee in adhering to legislation, and the potential consequences of non-compliance.

## Learning outcomes and assessment criteria

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	
1	Know the purpose, aims and values of your organisation and how it operates	1.1	State the organisation's purpose and aims in relation to the sector in which it operates
		1.2	Describe how the organisation's core values link to its customer service culture
		1.3	Describe what the organisation's 'brand promise' tells customers about the value of the service offer
		1.4	Describe the features and benefits of the organisation's products and/or services
2	Know internal policies and procedures relating to the customer service role	2.1	Describe the purpose of the organisation's policies and procedures in relation to customer service delivery
		2.2	Explain the impact of internal policies and procedures on customer service delivery
		2.3	Describe the guidance typically found in an organisation's digital media policy
		2.4	Explain how a code of conduct or ethical standards affect own role
3	Know legislation and regulations that apply to a customer service role	3.1	Explain how consumer related legislation/regulations can affect the delivery of customer service
		3.2	State the responsibilities of employers and employees relating to health and safety in a customer service environment
		3.3	State own responsibilities for complying with data protection legislation and regulations relating to their job role
		3.4	Outline the legal and commercial consequences the organisation may face by not complying with relevant legislation and regulations

## Unit content

### What needs to be learned

#### Learning outcome 1: Know the purpose, aims and values of your organisation

##### 1A Purpose and aims of the organisation

- Purpose of the organisation, e.g. what it does (nature of the business).
- Business aims, e.g. specific intended outcomes of business strategy, anticipated end results.
- Sectors:
  - private sector:
    - definition
    - types of private sector organisations
    - main purpose, e.g. profits, employment.
  - public sector
    - definition
    - types and examples of public sector organisations
    - main purpose – providing a public service.
  - voluntary/third sector:
    - definition; types and examples of third sector organisations
    - purpose of third sector organisations, e.g. benefit and enrich society, create social impact.
- Differences between organisations that operate in the public, private and voluntary/third sector.
- Relationship between an organisation's sector and its aims.
- Branding:
  - definition of a brand
  - purpose of branding
  - identifying a brand (name, logo, colours, tagline).
- Brand promise:
  - meaning and examples of brand promise
  - how organisations communicate brand promise, e.g. customer experiences, marketing communications, product packaging, employee relations
  - importance of keeping the brand promise, e.g. builds trust and relationships with customers, 'people buy from people', increases brand loyalty, repeat purchases, increases sales and profits, gives a competitive advantage, promotes consumer confidence, 'word of mouth' marketing, reflects company values.

## **Learning outcome 1: Know the purpose, aims and values of your organisation (continued)**

- Difference between brand image (i.e. customer perception of brand) and reputation (i.e. public opinion about organisation's corporate actions).
- Customer centric versus organisation-centric.
- Relationship between brand image and reputation.
- Definition of a service offer:
  - pricing, range of products, services and facilities unique to an organisation, e.g. after-sales service, delivery
  - policies and processes, e.g. refund policy, complaints process, service level agreements (SLAs).
- Examples of service offers of different service-based businesses.
- Comparison of small and large service-based business offers.

### **1B Core values and service culture**

- Definition and examples of organisational core values, their purpose in the organisation and how core values relate to the organisation's service culture.
- Influence of core values:
  - factors, e.g. size and type of organisation
  - impact on individual behaviour, e.g. personality, traits and types and its relevance in understanding self and others
  - impact on team behaviour, e.g. commitment to shared beliefs, team loyalty
  - impact on the organisation, e.g. strategic planning, setting objectives.
- Service culture:
  - meaning of service culture
  - impact of organisational values on service culture
  - how to communicate the organisational service culture in a customer service role, e.g. dress code, interactions with customers, product knowledge, personal behaviours and attitudes.

## **Learning outcome 1: Know the purpose, aims and values of your organisation (continued)**

### **1C Products and services of the organisation**

- Organisational product/service offer:
  - range of products and/or services
  - new and existing
  - availability
  - delivery arrangements
  - post-transaction services and support.
- Features and benefits:
  - difference between a feature and benefit of a product or service
  - examples of features and benefits of products and/or services
  - how to use features and benefits of products/services to identify products/services that meet customers' needs
  - turning features into benefits in customer interactions.
- Keeping product/service knowledge up to date:
  - importance of keeping knowledge up to date, including providing correct information to customers, identifying best products/services to meet customers' needs, boosts customer confidence and customer satisfaction.

## **Learning outcome 2: Know internal policies and procedures relating to the customer service role**

### **2A Internal policies of the organisation**

- Difference and relationship between a policy and a procedure:
  - policy: a statement used to set the direction for how an organisation intends to conduct its services, actions or business
  - procedure: a series of steps to be followed as a consistent and repetitive approach to achieve a specific outcome. A policy may have accompanying procedures (e.g. a complaints policy and a procedure for processing/handling complaints). A policy can exist without a procedure and vice versa.
- Different types of organisational policies and procedures related to customer service and their purpose (i.e. why they are needed), including complaints and escalation procedures.
- Importance of following policies and procedures in customer service delivery, including provision of consistent service, maintaining service quality, compliance with legislation and regulations.
- Digital media policy including:
  - what is meant by digital media
  - purpose of a digital media policy
  - types of guidelines within a social media policy, e.g. confidentiality, standards of behaviour, privacy settings, use of personal information, copyright compliance.

### **2B Codes of conduct and ethical standards**

- Code of conduct definition (i.e. a set of written rules/guidelines which explains how people working in a particular profession, or organisations within a particular industry should behave).
- Code of conduct purpose within an industry, e.g. creating and maintaining industry standards, providing practical guidance for dealing with customer problems/complaints, protecting consumers by ensuring provision of quality goods and services, building the profile and reputation of the industry.
- Specific examples of codes of conduct relevant to apprentices' employment contexts and their main principles.
- Meaning of ethical standards, including relationship between codes of conduct and ethical standards.
- Specific examples of ethical standards relevant to an apprentice's employment contexts.
- Potential impact of not following relevant codes of conduct and ethical standards, including legal consequences, loss of customer confidence and loyalty, reduced strength of competition in the industry.

## **Learning outcome 3: Know legislation and regulations that apply to a customer service role**

### **3A Main consumer protection legislation and regulations**

- Main provisions/requirements of consumer-related legislation and regulations, including:
  - Consumer Rights Act
  - Consumer Credit Act
  - Trade Descriptions Act
  - Consumer Protection Act
  - Consumer Contracts Regulations.
- How consumer-related legislation and regulations are applied in practice, e.g. providing clear and accurate information to customers, following relevant organisational policies and procedures.
- Potential impact of non-compliance with consumer-related legislation and regulations on the organisation, the customer service practitioner and the customer.

### **3B Equality legislation**

- Requirement to legally protect people from discrimination in the workplace and in wider society.
- Protected characteristics under equality legislation.
- Importance of equality legislation in a customer service environment.
- How the equality legislation can be applied in practice in customer service delivery, e.g. treating all customers with dignity and respect, following organisational equality policy, adapting service approach to meet customers' specific needs, communicating in an open, fair and respectful manner, providing equally accessible service to all.
- Potential impact of non-compliance with equality legislation on the organisation, the customer service practitioner and the customer.

### **Learning outcome 3: Know legislation and regulations that apply to a customer service role (*continued*)**

#### **3C Health and safety legislation**

- Requirement to legally ensure the health, safety and welfare at work for all employees.
- Importance of health and safety in the work environment and in customer service delivery.
- Responsibilities of employers and employees under the Act.
- How the legislation can be applied in practice, e.g. following health and safety training received, taking reasonable care of own and others' health and safety, co-operating with employer on health and safety, reporting occurrences where inadequate precautions are putting anyone's health and safety at risk.
- Potential impact of non-compliance with health and safety legislation on the organisation, the customer service practitioner and the customer.

#### **3D Data protection legislation**

- Key principles under the legislation.
- Importance of keeping information confidential.
- Types of information to be kept confidential in the business, including customers' personal data.
- How the legislation can be applied in practice, e.g. secure storage of paper-based records, following policies and procedures for using computer systems, web-based technology and mobile devices (e.g. using passwords, locking screens).
- Employee (customer service practitioner) responsibilities under data protection legislation:
  - follow organisational policy/procedures for collection, storage, processing, retention and disposal of personal data
  - maintain security/confidentiality of data (paper-based, electronic)
  - report data security risks in line with organisational procedures.
- Potential impact of non-compliance with data protection legislation on the organisation, the customer service practitioner and the customer.

**Learning outcome 3: Know legislation and regulations that apply to a customer service role (*continued*)**

**3E Industry-specific legislation and regulations**

- Requirements of legislation and regulations that affect the delivery of customer service in specific industries as applicable to apprentices.
- How industry-specific legislation and regulations impact on the delivery of customer service and the implications of not complying with them.

## Essential information for tutors and assessors

### Essential resources

There are no special resources needed for this unit.

### Assessment

This unit is internally assessed. To pass this unit the evidence that the learner presents for assessment must demonstrate that they have met the required standard specified in the learning outcomes and assessment criteria.

The assessment for this unit should be set in a specific organisational context to allow learners to apply their knowledge and understanding in a realistic and practical way, draw on learning from the unit and designed in a way to enable the learners to meet all the assessment criteria.

A recommended assessment approach is provided below; centres are free to create their own assessment as long as they are confident it enables learners to provide suitable and sufficient evidence to meet the stated standard of the assessment criteria and achieve the learning outcomes.

### Learning outcome 1

**To satisfy the assessment criteria for this learning outcome**, learners will research information about the organisation in which they are working in to help them understand its purpose, aims and values in relation to the sector in which it operates. Learners will present their findings in an 'information sheet' about the organisation. The information sheet can include graphics and images. Learners who are not employed can prepare the information sheet on an organisation with which they are familiar. In their information sheet, learners will:

1. state the sector in which the organisation operates (AC 1.1)
2. state the organisation's purpose and aims and give information to show how they relate to the sector in which the organisation operates (AC1.1)
3. outline the core values of the organisation and describe **two** ways in which they link to the organisation's service culture. Learners must provide details to show a clear relationship between the core values and service culture (AC1.2)
4. state what is meant by the organisation's 'brand promise' (AC1.3)
5. give **two** examples of how the organisation's 'brand promise' can give customers information about the value of the service offer (AC1.3)
6. describe the features and benefits of at least **three** products and/or services offered by the organisation (AC1.4).

## Learning outcome 2

**To satisfy the assessment criteria for this learning outcome**, learners will produce a set of notes on how internal policies and procedures, including complaints procedures and digital media policy apply to their organisation and job role, and ways in which they can support the organisation in applying them. They will also include ways in which relevant codes of conduct and ethical standards affect customer service delivery. Learners will present the information in a training guide for new customer service practitioners joining their team. Learners who are not employed can base their information on an organisation with which they are familiar. In their set of notes learners will:

1. describe the purpose of **two** different organisational policies and two different organisational procedures that relate to their customer service role; one policy or procedure must include complaint handling (AC2.1)
2. outline using supporting examples, ways in which the **two** identified organisational policies and the **two** identified organisational procedures impact on their customer service delivery (AC2.2)
3. describe **three** different types of guidelines found in a digital media policy. Learners must clearly show the purpose of the digital media policy in managing the use of social media in a customer service working environment (AC2.3)
4. outline **two** ways a code of conduct or ethical standards affect customer service and give a reason for each to show how it affects customer service delivery (AC2.4).

### Learning outcome 3

**To satisfy the assessment criteria for this learning outcome**, learners will produce a set of research notes to help them understand how relevant legislation and regulations apply to their organisation and job role, and ways in which they can support the organisation in applying them. Learners who are not employed can base their information on an organisation they are familiar with. In their set of research notes, learners will:

1. outline the main requirements of a minimum of **two** consumer-related legislation/regulations that affect the organisation's customer service provision. (AC3.1)
2. outline **three** ways in which legislation and/or regulations identified in Task 1 affect the delivery of customer service and give reasons to support each (AC3.1)
3. state at least **two** responsibilities that employers have under health and safety legislation and/or regulation (AC3.2)
4. state at least **two** responsibilities employees (customer service practitioners) have under health and safety legislation and/or regulation (AC3.2)
5. state **two** responsibilities employees (customer service practitioners) have under data protection legislation and/or regulation (AC3.3)
6. outline **three** legal and commercial consequences that the organisation could suffer if it does not comply with legislation and/or regulations identified in Task 1 (AC3.4).

## Unit 2: Understanding How to Deliver High-Quality Customer Service

<b>Level:</b>	<b>2</b>
<b>Unit type:</b>	<b>Knowledge</b>
<b>Guided learning hours:</b>	<b>34</b>

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### Unit introduction

When working in a customer service role, it is important that you understand key principles, concepts and practices of customer service as they will form the basis of how you interact with customers and colleagues.

In this unit, you will explore what customer service means, the key features of high-quality customer service and its importance to the success of an organisation. You will consider the effects that poor customer service can have.

You will look at the needs and/or priorities of different types of customers related to your organisation and the ways in which the service approach can be adapted to meet their specific needs. You will learn about the importance of building trust and how to develop and maintain positive and long-lasting relationships with customers of your organisation.

Finally, you will explore the systems, equipment and/or technology used in customer service, and the different measurement and evaluation tools used to monitor the standard of service provided to customers.

This unit links with *Unit 6: Delivering High-Quality Customer Service*. Consideration should be given to delivering the related content together.

## Learning outcomes and assessment criteria

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	
1	Understand the need for high-quality customer service	1.1	Explain what is meant by a 'customer-focused experience'
		1.2	Describe the role of customer service in providing positive customer experiences
		1.3	Explain the key features of high-quality customer service
		1.4	State why high-quality customer service is important to the success of an organisation
		1.5	Describe the effects of poor customer service on an organisation
		1.6	Explain the importance of taking ownership of customer needs, priorities and expectations from the first contact
2	Understand different types of customer, their needs and how to meet them	2.1	Compare differences between internal and external customers
		2.2	Explain differences in service approach that may be required when managing internal and external customer relationships
		2.3	Describe the needs and/or priorities of different types of customers
		2.4	Describe the characteristics of different customer personalities and how their expectations can be managed
		2.5	Describe the specific needs that some customers may have under the Equality Act and how these needs may be met
		2.6	Describe the signs and signals from a customer which indicate that a change in service approach may be required
		2.7	Explain how service approach can be adapted to meet the needs and expectations of different types of customer

Learning outcomes		Assessment criteria	
3	Understand how to build trust with customers	3.1	Describe techniques that can be used to put customers at ease and gain their trust
		3.2	State why building trust is important for the customer and the organisation
		3.3	Describe the types of information that can be gathered from customers in order to create a 'customer-focused experience'
		3.4	Explain the importance to an organisation of balancing its needs with the needs of its customers
4	Understand the resources used in customer service delivery	4.1	Explain how systems, equipment, technology and other resources can be used effectively to meet the needs of customers
		4.2	Describe the types of measurement and evaluation tools used to monitor the standard of service provided to customers

## Unit content

### What needs to be learned

#### Learning outcome 1: Understand the need for high-quality customer service

##### 1A The customer experience

- Customer-focused experience definition, including personalisation, putting customers at the heart of the service culture, understanding and meeting customer needs and expectations.
- Customer experience journey:
  - attract
  - acquire
  - engage and develop relationships
  - provide products and/or services
  - retain
  - refer if required
  - end relationship, e.g. dissatisfaction, affordability, change in needs, organisational change.
- Examples of the stages of the customer experience journey in different types and sizes of customer service organisations and the nature of the interactions at each stage.

##### 1B The need for high-quality customer service

- Definition of customer service.
- Different types of customer service, including sales and marketing, general support service, technical support.
- Relationship between customer service and customer experience, i.e. key factor in delivering positive/good customer experiences, links between customer needs and expectations and customer satisfaction.
- Features of high-quality customer service, including reliability, competence, professionalism, responsiveness, courtesy, personalisation, credibility /trustworthiness and consistency.
- Examples of the features of high-quality customer service, e.g. friendliness and positive body language, good product and/or service knowledge, following up on queries/requests, appropriate use of language, reasonable service level agreements (SLAs), efficient procedures for resolving customer queries and problems.

## **Learning outcome 1: Understand the need for high-quality customer service (continued)**

- Benefits of building good customer relationships, e.g. customer satisfaction, customer retention, customer recommendations, profitability, increased sales.
- Importance of high-quality customer service to the success of the business, e.g. high customer satisfaction, positive customer experiences, good brand reputation, customer trust and loyalty, repeat business, competitiveness.
- Effects of poor customer service on a business, e.g. reduction in customer base, sales and profitability, increased customer complaints, low employee morale, poor brand reputation, higher stock wastages.

### **1C Taking ownership**

- Taking ownership of customers' needs, e.g. understand products and services which meet needs, providing assurances, keeping customers informed, seeing service through to completion, offering workable solutions, checking customer satisfaction, escalating issues, being accountable for own work.

## Learning outcome 2: Understand different types of customer, their needs and how to meet them

### 2A Types of customer

- Definition of a customer: 'An individual, business, or other organisation to which you or your organisation provide a service or sell a product'.
- Customers can be:
  - internal customer definition, i.e. from within the organisation, e.g. colleagues, line managers, staff working in other departments
  - external customer definition, i.e. from outside the organisation, e.g. paying customer (individual, families, other firm or business), government departments
  - new to the organisation
  - have specific needs, e.g. protected characteristics under the Equality Act 2010
  - have specific requirements/priorities, e.g. timescales
  - challenging – where communication difficulties and interactions need to be overcome, e.g. impatient, indecisive, argumentative
  - dissatisfied – e.g. unhappy with product offer or purchase, unhappy about the service received.
- Managing internal and external customer relationships:
  - using appropriate service approach
  - considerations for service approach including formality of approach, tone of voice, method of communication, frequency of communication, organisational guidelines.
- Identifying different customer personalities (analytical, amiable, expressive and driver) and using appropriate communication and interpersonal skills to interact effectively with each type; for example:
  - analytical, e.g. being logical, give accurate and clear information, focuses on facts, being patient
  - amiable, e.g. being social and friendly, listening and building rapport, helps them to identify their needs
  - expressive, e.g. being sincere and shows genuine interest, gives them time and avoids pressuring; demonstrates trust – keeping promises
  - driver, e.g. being quick, focused and to the point, offers justifications, showing confidence, offering choices to enable them to make their own decisions.

## **Learning outcome 2: Understand different types of customer, their needs and how to meet them (*continued*)**

### **2B Customer needs and expectations**

- Customer expectations:
  - definition of customer expectations and how expectations are formed
  - features of customer expectations, e.g. value for money, personalisation, accuracy and reliability, information and advice, open communication and efficiency.
- Impact of customer expectations on customer experience, i.e. positive or negative customer experience depending on whether expectations were not met, were matched or were exceeded.
- Needs and priorities vary according to type of customer.

### **2C Meeting customer needs**

- Using product features and benefits to identify the most appropriate products and/or services to meet customers' needs.
- Presenting products and/or services accurately and clearly to customers using appropriate communication skills.
- Using problem-solving and negotiation skills to agree solutions to any customer issues.
- Demonstrating appropriate behaviours, e.g. willingness to help, empathy, openness, remaining calm and focused, showing respect for customer's views.
- Working within the remit of own role and responsibility and the organisation's policies and procedures, escalating issues when appropriate.
- Ways of meeting specific needs, e.g. providing a seat for an elderly customer, helping to pick items from shelves for a customer using a wheelchair, offering hearing loop technology.
- Knowing when to adapt service approach, including signs and signals for when to adapt, e.g. customer with a visible protected characteristic, customer dissatisfaction, customer body language.
- How to adapt service approach according to customer needs and expectations, e.g. changing personal behaviours and communication style to reflect customers' personalities (amiable, expressive, analytical and driver), empathising, changing response/delivery times to fit with customer needs, seeking support from line manager.

## **Learning outcome 2: Understand different types of customer, their needs and how to meet them (*continued*)**

### **2D Respecting customer diversity and individuality**

- Definition and examples of diversity in customers, including differences in personal beliefs, personal style and appearance, religion, ethnicity, culture, language, socio-economic status, physical and mental ability.
- The importance of respecting diversity and individual differences, e.g. not judging others and treating everyone equally, compliance with equality legislation, providing positive customer experiences.
- Ways of showing respect for customer diversity, e.g. not stereotyping or making assumptions about customers, listening for how customers want to be treated and then treating them accordingly, using simple, appropriate and non-offensive language, being aware of cultural or demographic differences and norms in the organisational customer profile, following organisational policies and best practices for diversity, being polite, patient and considerate.

## Learning outcome 3: Understand how to build trust with customers

### 3A Providing a personalised customer experience

- Establishing the facts (understanding customer needs and expectations):
  - actively listening to customers
  - use of open and closed questions to elicit information
  - empathy towards customers' point of view
  - positive communications
  - building rapport with customers.
- Delivering a customer focused experience:
  - confirming customer needs, e.g. what product or service they need
  - targeting product features and benefits to meet specific needs
  - seeking customer feedback to demonstrate or eliminate selection to better match customer needs
  - demonstrating a positive attitude and willingness to help
  - responding positively to customers' concerns
  - managing customer expectations, e.g. communicate any aspects which cannot be delivered, explaining why, seeking customer feedback to demonstrate or eliminate selection to better match customer needs.

### 3B Building trust with customers

- Ways of building trust with a customer:
  - consistency in service, e.g. listening, being respectful, meeting promises, or timeliness
  - meeting or exceeding expectations
  - transparency, e.g. being up front and honest, admitting to mistakes.
- Importance of customer trust, e.g. impact on customer relationship and customer loyalty, repeat business, customer recommendations, positive brand image.
- Importance of fulfilling promises made to customers, e.g. customer satisfaction, customer retention, customer recommendations, profitability, increased sales.

**Learning outcome 3: Understand how to build trust with customers**  
***(continued)***

**3C Balancing the needs of customers and the organisation**

- Ways of ensuring needs are balanced:
  - knowledge of organisation's products and services
  - understanding organisation policies and processes, e.g. returns or offer discount.
- Importance of balancing needs of the organisation with needs of customers:
  - meeting regulatory requirements
  - meeting the needs of other organisational stakeholders
  - protecting profitability and revenue
  - maintaining brand image, values and promise
  - achieving organisational goals and mission.

## **Learning outcome 4: Understand the resources used in customer service delivery**

### **4A Systems, equipment and technology**

- Bespoke systems and technology relevant to apprentices' employment contexts and how they are used in the delivery of customer service in the organisation.
- Generic systems and technology and how they are used, e.g. point of sale (POS) equipment, self-service points, customer relationship management (CRM) systems, organisation web pages, telecommunications technology.
- Trade-specific systems equipment and technology, e.g. handheld order devices, card-swipe systems, catering equipment.

### **4B Resources**

- Resources, e.g. product and service information/guidance, marketing/promotional information, operating procedures, customer information, office resources, e.g. stationery, till rolls, scripts relevant to legislation, e.g. direct debit guarantees, distance selling; floats for payment points, daily schedules/staff rota.

### **4C Measuring and evaluating the quality of customer service**

- Evaluation tools, e.g. call monitoring, surveys (telephone and online), face-to-face interviews, mystery shoppers, social media activity, observations of customer interactions.
- Measures for monitoring depend on the specific organisational goals and mission, e.g. number of customer complaints or queries, number of damaged or faulty goods returned, time taken to fulfil order, number of new customers, number of queries and/or leads converted into sales, average time taken to resolve customer problems.
- Importance of monitoring customer service levels:
  - identifying problems or opportunities for improvement
  - ensuring customer satisfaction
  - protecting the brand promise
  - achieving organisational goals.

## Essential information for tutors and assessors

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### Essential resources

There are no special resources needed for this unit.

### Assessment

This unit is internally assessed. To pass this unit, the evidence that learners present for assessment must demonstrate that they have met the required standard specified in the learning outcomes and assessment criteria.

The assessment for this unit should be set in a specific organisational context to allow learners to apply their knowledge and understanding in a realistic and practical way. It must draw on learning from the unit and be designed in a way that enables learners to meet all the assessment criteria.

A recommended assessment approach is provided below; centres are free to create their own assessment as long as they are confident it enables learners to provide suitable and sufficient evidence to meet the assessment criteria and achieve the learning outcomes to the same standards as demonstrated in the recommended assessments below.

### Learning outcome 1

**To satisfy the assessment criteria for this learning outcome**, learners will produce information (this may include images) or a video on the importance of high-quality customer service in their employer organisation, to be shared with their team members. Learners who are not employed can produce the information or video based on a customer service business with which they are familiar. In their information/video, learners will:

1. outline what is meant by 'customer focussed experience', providing examples of **two** different stages/touchpoints in the customer experience journey of the organisation that impact on customer experience (AC1.1)
2. describe how customer service contributes to providing positive customer experiences; the description must draw on the relationship between customer service and customer experiences (AC1.2)
3. outline **three** features of high-quality customer service and give a reason for each to show why it would help the organisation to deliver high-quality customer service (AC1.3)
4. give **three** reasons why high-quality customer service is important to the success of the organisation (AC1.4)

5. describe **three** different ways in which poor customer service can affect the success of the organisation (AC1.5)
6. outline the need for taking ownership from first contact with the customer and provide **two** reasons to support this; **one** reason must be from the perspective of the customer and **one** reason must be from the perspective of the organisation (AC1.6).

## Learning outcome 2

**To satisfy the assessment criteria for this learning outcome**, learners will create profiles of the different customer types of the organisation in which they are working in and the needs and expectations of each type. Customer profiles will be shared with other apprentices in the training environment to use as a basis for group discussion. If learners are not employed, they can create customer profiles on the customers of a customer service business with which they are familiar. In their customer profiles, learners will:

1. Identify the internal and external customers relating to the organisation using examples and give detailed reasons to show how they differ from each other (AC2.1)
2. outline **four** actions and behaviours used when managing internal and external customer relationships and give reasons to support these. For each, give a reason to show how the actions and behaviours are appropriate for managing relationships with each type of customer (AC2.2)
3. describe **three** different types of customer they are likely to deal with in the organisation, and for each detail their needs and/or priorities. Needs and/or priorities must be specific to each type of customer and not just the needs and/or priority of customers in general; at least **one** type of customer must be new to the organisation (AC2.3)
4. describe characteristics of **three** different customer personalities and give **two** ways that the expectations of these customers' can be managed. Learners must show the behaviours and skills they would apply in order to meet the expectations of each customer personality (AC2.4)
5. describe **two** specific needs of customers protected under current equality legislation that they are likely to deal with in the organisation. Learners must show how they would meet the specific needs of each of these customers (AC2.5)
6. describe at least **two** signs and signals customers may show that indicate a need to adapt the service approach (AC2.6)
7. outline ways in which service approach can be adapted to meet the needs of **three** different types of customer. For each, give a reason to show how the adapted service approach would be effective for each customer in terms of meeting their needs and expectations (AC2.7).

### Learning outcome 3

**To satisfy the assessment criteria for this learning outcome**, learners will produce a guidance document to give to new colleagues or other apprentices on the topic of building trust with customers. The guide should include different ways in which a customer service practitioner can build trust with a customer. In their guidance document, learners will:

1. describe **four** techniques that can be used to put customers at ease and to gain the trust of customers. Techniques must be specific and show how they would be effective in putting customers at ease and gain trust of customers (AC3.1)
2. give **two** reasons why building trust is important; **one** reason must be from the perspective of the organisation and **one** reason from the perspective of the customer (AC3.2)
3. describe **three** different types of information that can be obtained from customers about their needs. The description must draw on the relationship between the information gathered and creating a customer-focussed experience (AC3.3)
4. outline **two** ways the needs of the organisation can be balanced with the needs of its customers and give at least **one** reason for each to show why it is important for the organisation to do so (AC3.4).

### Learning outcome 4

**To satisfy the assessment criteria for this learning outcome**, learners will produce a presentation on the different tools, systems, equipment, technology and/or other resources that can be used in the delivery, measurement and evaluation of customer service in their organisation. Learners who are not employed can produce the presentation on a customer service business with which they are familiar. In their presentation learners will:

1. give detailed examples of how different systems, equipment, technology and resources help them to meet customer needs (AC4.1)
2. describe **three** measurement and evaluation tools that can be used by an organisation to monitor the standard of service provided to customers. (AC4.2).

## Unit 3: Understanding Personal Effectiveness in a Customer Service Work Environment

<b>Level:</b>	<b>2</b>
<b>Unit type:</b>	<b>Knowledge</b>
<b>Guided learning hours:</b>	<b>35</b>

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### Unit introduction

Employers are no longer looking for people with just technical specialist skills; they are also searching for staff who can represent their brand effectively and who have the right mix of transferable skills and personal attributes to deal with the challenges of the modern workplace. Having the right mix of these skills makes individuals more personally effective in their job role.

People who are personally effective are able to make the best use of their abilities. They are better able to manage their time and emotions, get along with their colleagues, deal with changing situations and challenges, solve problems, manage their personal performance and, ultimately, become strong ambassadors for their organisation. Personal effectiveness enables individuals to become more productive in their job role and to contribute to the success of the organisation.

In this unit, you will learn about professionalism and its importance in the workplace. You will develop knowledge and understanding of the transferable skills and personal attributes that underpin personal effectiveness in a customer service role, the strategies for developing these skills and personal attributes, and the benefits they provide.

This unit links with *Unit 8 Managing Personal Effectiveness in a Customer Service Job Role*.

## Learning outcomes and assessment criteria

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	
1	Understand professionalism and its importance in a customer service work environment	1.1	Describe the requirements and expectations for professionalism in a specific customer service work environment
		1.2	Describe where to find information on employer expectations and standards for professionalism in a specific customer service work environment
		1.3	State why professionalism is important in a customer service work environment
2	Understand how to develop and demonstrate a range of transferable skills and personal attributes that contribute to personal effectiveness at work	2.1	Describe what it means to have good work ethics and how to demonstrate good work ethics in a customer service job role
		2.2	Describe how to problem-solve in the workplace
		2.3	Explain how to develop personal adaptability and the benefits of adaptability in the workplace
		2.4	Explain how to build personal resilience and the benefits of doing so in the workplace
		2.5	Explain how to work in own job role to respond appropriately to the commercial features of a specific customer service organisation
		2.6	Explain how to self-manage in the workplace and the benefits of effective self-management for self and others
		2.7	Explain how to work effectively in a team and the impact of poor team working on an organisation

Learning outcomes		Assessment criteria	
3	Understand how to manage personal performance in the workplace	3.1	Describe how to manage personal performance in the workplace
		3.2	State why it is important to manage personal performance in the workplace
4	Understand how to manage personal and professional development in the workplace	4.1	Describe how to identify own learning and development needs
		4.2	Compare different learning and development activities
		4.3	Describe how to produce and maintain a personal development plan

## Unit content

### What needs to be learned

#### Learning outcome 1: Understand professionalism and its importance in a customer service work environment

##### 1A Requirements for professionalism

- Meaning of professionalism, i.e. meeting the expectations, standards and values defined by the employer; following the rules, guidelines, duties and responsibilities related to a job role. Written or unwritten rules, guidelines and expectations.
- Different requirements for professionalism in different work environments and organisations.

##### 1B Characteristics of professionalism

- Personal behaviours and conduct, including:
  - following organisational code of conduct, e.g. general conduct, conflict of interest, social media use, privacy and confidentiality, relationships
  - demonstrating a positive work attitude and commitment
  - being punctual
  - showing respect and consideration for others
  - being courteous and cooperative.
- Competence in the job role:
  - having the necessary technical skills and knowledge to do the job, e.g. communication skills, building customer relationships, identifying and meeting customer needs and expectations, resolving customer queries, problems or complaints
  - having the relevant generic workplace competencies, e.g. team working, basic computer skills, commercial awareness, carrying out the responsibilities of the job role to the required standard
  - meeting deadlines and performance standards
  - meeting necessary regulatory or industry practice requirements, e.g. current data protection legislation, current consumer protection legislation.
- Personal dress and appearance:
  - good personal hygiene
  - cleanliness
  - following organisational dress code
  - maintaining a smart appearance.

**Learning outcome 1: Understand professionalism and its importance in a customer service work environment (*continued*)**

- Communication:
  - good listening and speaking skills
  - effective use of communication techniques
  - appropriate non-verbal communications
  - positive and professional language
  - good grammar and punctuation in written communications
  - following organisational greeting guidelines.

**1C Sources of information on professional standards**

- Sources of information for professional standards in the workplace, e.g. job descriptions, person specifications, induction process, employee handbook, line manager, human resources (HR) team, organisational intranet.

**1D Importance of professionalism in the workplace**

- Importance of professionalism to the employer:
  - consistent experience for customers
  - employee motivation
  - improved employee performance
  - compliance with specific industry requirements
  - enhancing organisational brand and reputation
  - more productive working relationships among staff.
- Importance of professionalism to the employee:
  - mutual respect between colleagues
  - good team working
  - maintaining personal image through communications
  - increased job satisfaction and personal growth.

**Learning outcome 2: Understand how to develop and demonstrate a range of transferable skills and personal attributes that contribute to personal effectiveness at work**

**2A Good work ethics**

- Meaning of work ethics.
- Elements of good work ethics with relevant behavioural examples:
  - being responsible, e.g. completing assigned tasks on time and to required standards, punctuality
  - commitment
  - honesty and integrity
  - professional behaviours and communications
  - demonstrating a positive approach
  - taking initiative/being proactive
  - self-development and self-motivation.
- How work ethics inter-relate with other personal attributes/personal behaviours.
- Ways of demonstrating good work ethics, e.g. reducing distractions at work, taking ownership for understanding own role, goals and responsibilities; being persistent and following through on tasks, avoiding procrastination, effective prioritisation and time management, asking for feedback on performance, continuously updating knowledge of organisational products and/or services, procedures, standards and relevant regulations and legislations; developing positive working relationships with colleagues, building trust and reliability.

**2B Problem-solving in the workplace**

- Nature of problems at work:
  - people, e.g. personality differences, cultural issues, customer dissatisfaction
  - processes, e.g. inefficient, not clear
  - products and services, e.g. availability, quality, suitability, cost
  - systems and equipment, e.g. outdated, breakdown/failure, new
  - resources, e.g. inadequate; communications.

**Learning outcome 2: Understand how to develop and demonstrate a range of transferable skills and personal attributes that contribute to personal effectiveness at work (*continued*)**

- Scope and impact of problem:
  - who is affected and how many people
  - what is affected
  - who can resolve
  - duration of impact (short-term, medium term, long-term)
  - financial loss
  - customer dissatisfaction.
- Sources of help for solving problems including, colleagues, managers/supervisors, policies and procedures.
- Problem-solving process:
  - identifying the problem
  - developing understanding of the problem, e.g. fact finding, analysis, understanding the interest of others
  - identifying possible options/solutions
  - evaluating options/solutions
  - deciding on an option/solution and documenting
  - implementing solution
  - seeking feedback, monitoring and evaluating success
  - recognising when to escalate issues outside level of authority/level of skills or knowledge.

**2C Personal adaptability in the workplace**

- Meaning of adaptability in a workplace context, i.e. willingness and ability to readily respond to changing circumstances and expectations.
- The need for adaptability:
  - fast pace of change in industry and technology
  - responding to impact of external factors
  - responding to stakeholder emerging needs
  - mental and physical well-being.

**Learning outcome 2: Understand how to develop and demonstrate a range of transferable skills and personal attributes that contribute to personal effectiveness at work (*continued*)**

- Behaviours that demonstrate adaptability at work:
  - looking for ways to make changes work rather than identifying why changes will not work
  - responding positively to changing priorities and timescales, e.g. changing work planned to respond to an emerging problem
  - willingness to learn new methods and procedures
  - willingness to look beyond job description to achieve organisational goals, e.g. offering to cover the responsibilities of an absent colleague
  - open to different views and listening to others
  - making changes to ways of working on the basis of constructive feedback.
- Developing adaptability:
  - observing and learning from others
  - looking for the positives in challenging situations
  - developing resilience and emotional intelligence
  - listening to others and asking questions
  - making use of opportunities to engage in diverse and challenging activities/projects (leaving the comfort zone).
- Benefits of adaptability in the workplace:
  - for individuals, e.g. increased opportunities for career progression, success at work, being better able to deal with life challenges, being a more valuable employee, leadership capabilities
  - benefits for employer, e.g. innovation, remaining competitive, improved problem-solving, employee well-being.

**2D Building personal resilience in the workplace**

- Meaning of resilience, i.e. an individual's capacity to respond to pressure and the demands of daily life.
- Factors affecting resilience including:
  - adaptability
  - self-confidence
  - social support
  - purposefulness
  - physical and mental well-being
  - environment.

**Learning outcome 2: Understand how to develop and demonstrate a range of transferable skills and personal attributes that contribute to personal effectiveness at work (*continued*)**

- The need for resilience:
  - managing stress and workplace pressures
  - dealing with changing economy and modern work practices
  - mental and physical well-being
  - personal growth.
- Strategies to build resilience:
  - developing high-quality and supportive relationships
  - developing awareness of own strengths and weaknesses
  - using challenges as learning opportunities
  - focusing on positive outcomes and celebrating success
  - committing to realistic goals
  - seeking help and support when needed
  - practising regular self-reflection
  - maintaining a balanced diet and regular exercise.
- Benefits of resilience in the workplace:
  - for individuals, e.g. increased confidence, being more able to manage stress, increased opportunities for career progression
  - benefits for employers, e.g. more stable workforce, increased productivity, improved performance.

**2E Commercial awareness in the workplace**

- Meaning of commercial awareness, i.e. ability to understand what makes a business successful.
- Understanding an employer's operating environment and how to work in response to this.
- Commercial awareness in practice:
  - being able to view work situations from a commercial perspective impact on costs and revenues
  - considering factors (internal and external) that influence the success of a business
  - understanding the business processes, relationships, risks and costs.

**Learning outcome 2: Understand how to develop and demonstrate a range of transferable skills and personal attributes that contribute to personal effectiveness at work (*continued*)**

- Developing commercial awareness of an employer organisation:
  - fully understanding the organisation's mission, aims/goals, brand and commercial priorities
  - developing knowledge of the organisation's industry and the economic and political issues that affect the business
  - developing knowledge of the organisation's customers, major competitors and their place in the market
  - developing an appreciation of own role in the organisation, how it relates to others and how it adds value to the business.
- Sources of information to develop commercial awareness, e.g. organisational website and intranet, team meetings and away days, annual reports, line managers/supervisors, newspapers, industry reports.

**2F Self-management in the workplace**

- Meaning of self-management skills, i.e. ability to control feelings, emotions and activities to feel and be more productive.
- Areas of self-management:
  - self-awareness
  - stress management
  - time management.
  - Self-awareness:
    - emotional awareness
    - self-assessment (personal strengths, weaknesses, resources and limitations)
    - self-confidence.

**Learning outcome 2: Understand how to develop and demonstrate a range of transferable skills and personal attributes that contribute to personal effectiveness at work (*continued*)**

- Developing self-awareness:
  - asking for feedback to get different perspectives and identify blind spots
  - paying attention to other people's body language, emotions and words
  - recording thoughts, feelings, success and failures to clarify and clear mind
  - identifying strengths and weakness, e.g. using psychometric tests; exploring feelings and emotions
  - practising regular self-reflection and self-motivation.
- Potential causes of stress in the workplace, e.g. work overload, excessive travel, poor relationships, organisational changes, lack of communication.
- Warning signs of stress, e.g. fatigue, anxiety, inability to concentrate, muscle tensions, headaches, mood swings.
- Managing stress, e.g. seeking clarification of job/task requirements, prioritisation and organisation, creating a balanced schedule, asking for help and support from others, avoiding perfectionism, balanced nutrition and regular exercise, taking regular breaks, not over-committing.
- Time management strategies, e.g. using “to do” lists (monthly, weekly, daily), prioritising tasks (importance versus. urgency), scheduling tasks, allowing flexibility in scheduling, setting realistic goals and deadlines, regularly reviewing workload, keep multi-tasking to a minimum, minimising distractions, managing emails effectively.
- Benefits of effective self-management, e.g. greater self-confidence and creativity, stronger working relationships, better decision-making, job satisfaction, higher productivity and lower rate of absence from work, safer workplaces, positive work–life balance.

**Learning outcome 2: Understand how to develop and demonstrate a range of transferable skills and personal attributes that contribute to personal effectiveness at work (*continued*)**

**2G Effective teamwork**

- Meaning of teamwork.
- Characteristics of an effective team:
  - clear expectations and goals
  - clear roles and good balance of skills and abilities
  - good communication
  - strong leadership
  - mutual cooperation
  - openness and trust
  - good personal relationships.
- Team roles:
  - assigned or adopted roles
  - Belbin's team roles (Plan, Resource Investigator, Coordinator, Shaper, Monitor-Evaluator, Team Worker, Implementer, Completer-Finisher).
- Team dynamics and factors affecting team dynamics.
- Effective teamwork:
  - effective personal communications
  - inclusive and respectful behaviours
  - completing work on time and to required standards
  - listening to others and sharing ideas
  - supporting team members
  - building trust and rapport
  - resolving conflicts.
- Impact of poor team working:
  - staff turnover
  - objectives and targets not met
  - low morale
  - lack of motivation
  - conflicts.

## Learning outcome 3: Understand how to manage personal performance in the workplace

### 3A Managing personal performance in the workplace

- Identifying own responsibilities:
  - job description
  - contract
  - staff handbook
  - code of conduct
  - organisational structure.
- Goal-setting:
  - agreeing SMART objectives with line manager (KPIs)
  - alignment of objectives with organisational goals
  - relationship of personal objectives to those of team members and other colleagues.
- Measurement standards: agreeing criteria for measuring progress and achievement with line manager, varying criteria depending on organisation and role, e.g. quality of work, volume of work, timeliness of completion, customer satisfaction.
- Completing tasks/work:
  - meeting quality standards and agreed timescales
  - reporting problems beyond own level of competence.
- Monitoring and assessing performance:
  - asking for performance feedback from relevant colleagues
  - attending and engaging in regular one-to-one meetings
  - actively participating in annual performance appraisal, e.g. regularly updating performance review systems, preparing evidence for discussion at meeting.
  - being receptive to feedback on performance
  - using feedback from performance appraisals to inform personal development planning.
- Dealing with own underperformance:
  - managing own emotions, i.e. not taking feedback personally
  - listening to identify specific performance issues
  - reflecting on reasons for underperformance
  - discussing suggestions for improvement
  - agreeing a performance improvement plan (PIP) with line manager.

**Learning outcome 3: Understand how to manage personal performance in the workplace (*continued*)**

**3B Importance of managing personal performance in the workplace**

- Benefits to individuals:
  - clear understanding of job expectations
  - enhanced employment opportunities
  - job satisfaction
  - career progression
  - financial rewards or recognition for good performance.
- Benefits to employer/organisation:
  - delivery of strategic and operational goals
  - increased efficiency and productivity
  - reduced staff turnover
  - support staff planning and training.

## **Learning outcome 4: Understand how to manage personal and professional development in the workplace**

### **4A Identifying learning and development needs**

- Professional development:
  - development of role-related technical skills and knowledge
  - IT and communication skills.
- Personal development: development of transferable skills, e.g. self-awareness, adaptability, self-management.
- Identifying learning needs:
  - skills audit
  - analysis of job description and personal and team objectives
  - feedback from others
  - personal reflections.

### **4B Comparing different development activities**

- Formal versus. informal development activities.
- Features and advantages of different activities such as qualifications, training courses, on-the-job training, coaching, shadowing, job enlargement, job enrichment, mentoring.
- Suitability of activities depending on factors such as nature of learning needs, learning styles, outcomes required, cost.

### **4C Producing and managing a personal development plan (PDP)**

- Purpose of a PDP.
- Contents of a PDP:
  - SMART objectives
  - selected learning and development activities
  - resources
  - timescales
  - review mechanisms.
- Process of creating and managing a PDP:
  - identify learning needs (knowledge, skills and behaviours to be developed)
  - select relevant learning and development activities to meet needs
  - undertake planned activities
  - progress review
  - adapting plan according to outcome of review; review target completion.

## Essential information for tutors and assessors

### Essential resources

There are no special resources needed for this unit.

### Assessment

This unit is internally assessed. To pass this unit the evidence that the learner presents for assessment must demonstrate that they have met the required standard specified in the learning outcomes and assessment criteria.

The assessment for this unit should draw on learning from the unit and be designed in a way to enable the learners to meet all the assessment criteria.

Centres are free to choose their own forms of evidence for this unit as long as they enable learners to produce suitable and sufficient evidence to meet the stated standard of the assessment criteria and achieve the learning outcomes.

Forms of evidence such as learning logs, recorded question and answers and workbooks would be suitable sources of evidence for this unit. Regardless of the source of evidence used, learners will need to meet the standards stated below for each learning outcome.

### Learning outcome 1

**To satisfy the assessment criteria for this learning outcome**, learners will:

1. describe **three** different requirements and/or expectations for professionalism in their customer service work environment. Learners must provide details to show how these requirements are demonstrated in practice (AC1.1)
2. describe **two** sources in their workplace to get information about the expected behaviours and professional standards for their job role. Learners must provide details to show the specific type of information they would get from each source (AC1.2)
3. give **two** reasons why professionalism is important in their customer service work environment. One reason must be from the perspective of their employer and the other from the perspective of their customer, and the reasons must be specific to their work context (AC1.3).

## Learning outcome 2

To satisfy the assessment criteria for this learning outcome, learners will:

1. describe **three** elements of good work ethics (AC2.1)
2. describe **three** actions they could undertake, and/or behaviours that they could adopt to demonstrate good work ethics in carrying out their customer service job role (AC2.1)
3. identify **one** type of problem that may occur in their workplace (AC2.2)
4. describe how they would approach solving this problem, including the activities they would carry out and the people they would engage with. Their description must include the problem-solving process (AC2.2)
5. outline **two** ways they can develop their ability to adapt to changes and give **at least one** detailed reason for each to clearly show why these ways would support their development (AC2.3)
6. outline two ways in which adaptability in the workplace benefits the employer and **two** ways in which it benefits the customer, and give **at least one** detailed reason for each to show why they are of benefit (AC2.3)
7. outline **two** ways they can develop their personal resilience and give **at least one** reason for each to clearly show why these ways would support their development (AC2.4)
8. outline **two** ways in which personal resilience in the workplace benefits the employer and **two** ways in which it benefits the employee (AC2.4)
9. describe **three** commercial features of their employer organisation. These could be related to its aims and brand image, customer base, economic and political operating environment or competitive environment (AC2.5)
10. outline **two** ways in which they would operate within their job role to respond to these commercial features, and **give at least one** detailed reason for each to show why these ways would be appropriate to meet the commercial needs of their organisation (AC2.5)
11. outline **three** self-management practices they could use to be more productive at work, and give **at least one** detailed reason for each to show why these would improve their productivity (AC2.6)
12. explain, with supporting information, **two** ways in which effective self-management can benefit themselves and others in the workplace (AC2.6)

13. outline **three** ways they could contribute to effective team working and give **at least one** detailed reason for each to clearly show why each way would be helpful (AC2.7)
14. explain with supporting information, **two** ways in which poor team working practices impact on their employer organisation (AC2.7).

### **Learning outcome 3**

**To satisfy the assessment criteria for this learning outcome**, learners will:

1. describe **three** activities they could engage in to manage their own performance in the workplace. Learners must provide details of the purpose of each activity and what it involves (AC3.1)
2. give **three** reasons why it is important for individuals to manage their personal performance in the workplace (AC3.2).

### **Learning outcome 4**

**To satisfy the assessment criteria for this learning outcome**, learners will:

1. describe **two** ways of identifying own learning and development needs (AC4.1)
2. compare **two** different learning and development activities that could be used to address a specific personal development need in terms of their features, advantages and disadvantages (AC4.2)
3. identify the areas covered in a personal development plan (AC4.3)
4. describe how they would go about producing and maintaining their personal development plan. This must include the stages of development planning (AC4.3).

# Unit 4: Understanding Communication in a Customer Service Environment

<b>Level:</b>	<b>2</b>
<b>Unit type:</b>	<b>Knowledge</b>
<b>Guided learning hours:</b>	<b>30</b>

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## Unit introduction

Effective communication is an essential part of any customer service role. Customer service practitioners must have effective communication skills to perform their roles, work with colleagues and build relationships. But, what do we mean by 'effective communication'?

In this unit, you will explore what effective communication is and why it is important in customer service.

You will look at the effects of tone of voice and body language, and the potential impact of positive or negative customer service language on customers and their perception of an organisation. You will learn about the different questioning and listening skills that can be used when communicating verbally with customers. You will also learn about the verbal and non-verbal signals customers may display and what they tell you about how customers may be feeling.

You will explore different forms of written communication used in customer service, their purposes and the practices to follow when producing them.

This unit has links to *Unit 5 Communicating with Customers Effectively*, *Unit 6 Delivering High-Quality Customer Service* and *Unit 7 Handling Customer Conflict and Challenge*. Consideration should be given to delivering the related content together.

## Learning outcomes and assessment criteria

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	
1	Understand the role of communication in customer service	1.1	State why effective communication in customer service is important
		1.2	Explain why different methods of communication should be used in different situations in customer service
		1.3	Describe the types of information needed when communicating with customers
		1.4	Explain the importance of adapting communication to meet the specific needs of different customers
2	Know how to communicate with customers verbally	2.1	Describe how tone of voice and body language can affect the way customers perceive their experience
		2.2	Outline the impact of positive and negative customer service language on an organisation and its customers
		2.3	Describe different questioning and listening skills that can be used when communicating verbally with customers
		2.4	Describe verbal and non-verbal signals that show how a customer may be feeling

Learning outcomes		Assessment criteria	
3	Know how to communicate with customers in writing	3.1	Explain why it is necessary to use different forms of written communication for different purposes
		3.2	Describe practices for producing different forms of written communications
		3.3	Describe the potential benefits and limitations associated with communicating with customers in writing
		3.4	Explain the potential implications of confidentiality and data protection in communicating with customers in writing
4	Know how to communicate with customers through digital media	4.1	Explain how different digital media platforms can be used for customer service
		4.2	Describe organisational policy and guidelines for the use of digital media for customer service purposes
		4.3	Describe the etiquette required when communicating through digital media platforms

## Unit content

### What needs to be learned

#### Learning outcome 1: Understand the role of communication in customer service

##### 1A Effective communication

- Communication process (sender, receiver, message).
- Communication skills:
  - verbal communication skills:
    - active listening
    - questioning skills
    - effective speaking, e.g. tone and pitch, volume, pace, clarity, confidence, changing pitch accordingly for emphasis, use of pauses
  - non-verbal communication skills, e.g. facial expression, body language
  - written communication skills, e.g. appropriate choice of method, tone, language, business conventions.
- Importance of effective communication, e.g. better understanding of customers' needs, expectations and perspective; customers' understanding of product features and benefits, builds customer relationships, improves customer satisfaction and loyalty, customer retention, profitability and reputation of the organisation.

##### 1B Communication methods

- Methods:
  - written, e.g. letter, leaflets
  - digital, e.g. email, social media
  - verbal, e.g. telephone, face-to-face, demonstrations
  - non-verbal, e.g. body language
  - benefits and drawbacks of each method.

##### 1C Communication situations

- Circumstances, e.g. customer requesting information, customer making a complaint, customer asking for help, organisational decision to contact customers with information.
- Time constraints, e.g. need to adhere to organisation's service level agreements (SLAs), customer-initiated contacts require acknowledgement or answer as soon as possible.
- Legal requirements, e.g. contractual agreements and legally binding terms must usually be set out in writing.

## **Learning outcome 1: Understand the role of communication in customer service (*continued*)**

### **1D Adapting communication**

- Situations when adapting verbal communication may be required, e.g. differing levels of understanding, communicating with large groups, dealing with queries or complaints, dealing with conflict.
- Meeting the specific needs of customers protected under the Equality Act, 2010 including recognising the specific needs of these customers, e.g. English as a second language, a hearing impairment, giving a customer with a speech impediment more time to communicate.
- Importance of adapting communications:
  - to meet specific customer need, e.g. maximises effectiveness of communications
  - avoids confusion, misunderstanding or offence
  - makes information accessible to all customers, e.g. blind, deaf, non-English speakers.
- How to adapt verbal or non-verbal communication, e.g. listen and assess reactions, observe and mirror behaviours, repeat and summarise, use language, tone, pace and level of formality appropriate to different audiences.
- How to adapt tone of voice and behaviours:
  - listen to customers
  - observe their behaviour
  - change tone of voice and behaviour accordingly to match customers' needs and expectations, e.g. adjusting level of simplicity or complexity, mirroring customers' vocal style.

### **1D Relevant information for communicating with customers**

- Types of information:
  - from the customer, e.g. needs, wants and expectations
  - to the customer, e.g. product information and availability, organisational policies and procedures, offers, discounts and promotions, after-sales support, delivery arrangements.

## Learning outcome 2: Know how to communicate with customers verbally

### 2A Verbal and non-verbal communication

- Tone of voice:
  - pitch
  - volume
  - speed
  - professionalism
  - friendliness.
- Tone used is chosen in relation to the situation, e.g. in a stressful situation, tone of voice may be angry and curt; in a relaxed situation, tone of voice may be friendly.
- How tone of voice, choice of words and body language can affect the customer's perception of the customer service delivery and brand image, e.g. in a stressful situation, choice of words may be confrontational; in a relaxed situation, choice of words may be more informal/friendlier.
- Body language:
  - facial expressions
  - posture
  - movements.
- Positive and negative body language, e.g. open, closed, thoughtful, nervous, bored, disbelieving, indecisive.
- Impression created by different types of body language:
  - inappropriate body language, e.g. folded arms, sluggish posture, finger tapping, fiddling with objects
  - appropriate body language, smiling, eye contact, clear speech
  - different interpretations of different types of body language in different cultures.

### 2B Customer service language

- Positive customer service language:
  - words that convey support and develop confidence and reassurance, e.g. 'I can', 'I will ensure', 'I understand'
  - impact, e.g. repeat business, improved reputation, increased revenue, supports consistent delivery, improves customer experience, including tips for staff.

## **Learning outcome 2: Know how to communicate with customers verbally (continued)**

- Negative customer service language:
  - words with negative or judgemental implications, such as 'we don't provide that', 'I can't do that'
  - impact, e.g. complaints from customers, loss of business, damaged reputation.

### **2D Effective questioning and listening skills**

- Effective questioning skills:
  - using different types of questions, e.g. open, closed, probing, funnel, leading, rhetorical
  - using questions at the appropriate time, e.g. using open questions to obtain information from customers, checking understanding (clarifying).
- Effective listening skills, e.g. being attentive, allowing customers to speak without interruption, taking notes, repeating back to confirm understanding
- Understanding the feelings and emotions of the customer (empathetic listening).

### **2E Verbal and non-verbal signals presented by the customer**

- Non-verbal signals, e.g. facial expressions, body language.
- Verbal signals, e.g. tone of voice and verbal language used by customer.

## **Learning outcome 3: Know how to communicate with customers in writing**

### **3A Purposes of written communication**

- Different types of written communications, e.g. letters, reports, notices, flyers, leaflets.
- Purpose of written communications, e.g. communicating with colleagues and customers, sharing information, recording meeting outcomes, presenting product or service information, updating customer records.

### **3B Planning and practices for producing written communications**

- Considerations for planning document production:
  - purpose
  - content
  - audience needs
  - deadline
  - choice of medium to be used.
- Tone of voice, including professionalism, level of formality. The tone used is chosen in relation to the situation, e.g. audience, the message being communicated.
- How tone and choice of words can affect the customer's perception of the customer service delivery and brand image.
- Considerations when researching information, e.g. copyright, intellectual property, validity of sources.
- Business conventions for written communications:
  - opening and closing communications, e.g. salutations, close, paragraphing
  - proof-reading conventions, e.g. grammar, spelling, sentence construction
  - circulation, e.g. restricted, open, storage.
- Applying organisational standards and requirements:
  - corporate branding
  - house style
  - version control
  - document approval procedures.

### **Learning outcome 3: Know how to communicate with customers in writing (continued)**

- Using relevant application software:
  - considerations for design, layout and structure, e.g. use of templates and styles, page size and orientation, use of tables and images, combining information from other sources
  - selecting and using a range of tools, e.g. editing, formatting, inserting images and tables, inserting links.

#### **3C Benefits, limitations and legal requirements of using written communications**

- Benefits, e.g. customer and organisation have a written record of communications, customer details can help to generate and maintain a customer database listing, helps with promotion of organisation and offers that may be available to customers.
- Limitations, e.g. impersonal, inability to use verbal or non-verbal cues, may be poorly written and therefore misunderstood, may not be read by customer, inability to gauge customer reaction to information as it is not face-to-face.
- Implications of confidentiality and data protection, e.g. restricted access and use of personal information, information used with appropriate permissions, sensitive internal information could be recorded or distributed in error, the organisation's reputation could end up being tarnished and damaged, organisations can be fined for incorrect use of data, loss of business.

## **Learning outcome 4: Know how to communicate with customers through digital media**

### **4A Using digital media to deliver customer service**

- Social media platform:
  - definition
  - types of social media platform, e.g. Twitter™, Facebook™, LinkedIn™, Google+™, YouTube™ (these social media platforms are considered appropriate at the time of publication).
- Use of social media in customer service:
  - customer relationship marketing, e.g. Facebook page to communicate information and share experiences
  - widen customer base, gain business, establish new contacts
  - marketing and advertising, e.g. sending messages to customers about product launches
  - add value to the service offer
  - market intelligence.

### **4B Digital media policy guidelines**

- General guidelines:
  - follow organisational policies and procedures at all times, e.g. confidentiality, standards of behaviour, privacy settings, use of personal information, copyright compliance.
- Etiquette of digital communication:
  - type of language, e.g. appropriate, formal, informal, use of humour
  - appropriate use of media e.g. video, pictures, text
  - avoiding posting or sharing inappropriate material
  - appropriate use of emoticons.

## Essential information for tutors and assessors

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### Essential resources

There are no special resources needed for this unit.

### Assessment

This unit is internally assessed. To pass this unit, the evidence that learners present for assessment must demonstrate that they have met the required standard specified in the learning outcomes and assessment criteria.

The assessment for this unit should be set in a specific organisational context to allow learners to apply their knowledge and understanding in a realistic and practical way. It must draw on learning from the unit and be designed in a way that enables learners to meet all the assessment criteria.

A recommended assessment approach is provided below; centres are free to create their own assessment as long as they are confident it enables learners to provide suitable and sufficient evidence to meet the assessment criteria and achieve the learning outcomes to the same standards as demonstrated in the recommended assessments below.

### Learning outcome 1

**To satisfy the assessment criteria for this learning outcome**, learners will produce a presentation (this may include images) or a video on the role of communication in customer service, to be shared with their team members. Learners who are not employed can produce the presentation or video based on a customer service business with which they are familiar. In their presentation/video learners will:

1. state **three** reasons why effective communication is important in customer service. At least one reason must be from the perspective of the organisation and at least **one** reason must be from the perspective of the customer (AC1.1)
2. outline **three** different methods of communication that can be used in different situations and give reasons to support each method. Reasons must include an explicit link between the method and the situation and why each method is suited to each situation (AC1.2)
3. describe **two** types of information needed when communicating with customers (AC1.3)
4. outline the need for adapting communications to meet the specific needs of customers and provide reasons to support this. **One** reason must be from the perspective of the organisation and **one** reason from the perspective of the customer (AC1.4).

## Learning outcome 2

**To satisfy the assessment criteria for this learning outcome**, learners will give a verbal presentation, captured using audio or video technology, on the use of effective and appropriate verbal and non-verbal communication, to be presented to their team members. Learners who are not employed can produce their verbal presentation or video based on a customer service business with which they are familiar. In their verbal presentation, learners will:

1. describe ways in which tone of voice and body language can affect the way customers perceive their experience. **Two** ways must relate specifically to tone of voice and **two** ways must relate to the use of body language (AC2.1)
2. outline **four** ways that positive and negative customer service language can impact on an organisation and its customers. **Two** ways must relate to the impact of positive customer language and **two** ways must relate to the impact of negative customer service language (AC2.2)
3. describe **three** different questioning techniques that can be used when communicating verbally with customers. The description must include the type of information that can be gained from the customer using each questioning technique (AC2.3)
4. describe **two** verbal and **two** non-verbal signals that show how a customer may be feeling. Learners must show the link between the signal and what it is telling them about the way the customer may be feeling (AC2.4).

## Learning outcome 3

**To satisfy the assessment criteria for this learning outcome**, learners will produce a written training guide (this may include images) on how to produce effective and appropriate written communications, to be presented to their team members. Learners who are not employed can produce the guide based on a customer service business with which they are familiar. In their written training guide, learners will:

1. outline **two** reasons why it is necessary to use different forms of written communication for different purposes. Reasons must include an explicit link between the form of written communication and its purpose, and why each form is suited to each purpose (AC3.1)
2. describe **four** practices for producing different forms of written communication. The descriptions must include document planning and application of organisational standards (AC3.2)
3. describe **two** potential benefits and **two** potential limitations associated with communicating with customers in writing (AC3.3)
4. outline **three** potential implications of confidentiality and data protection in communicating with customers and give a reason to support each potential implication. **At least one** potential implication must be from the perspective of the organisation and **at least one** from the perspective of the customer (AC3.4).

## Learning outcome 4

**To satisfy the assessment criteria for this learning outcome**, learners will create an article that could be posted on an employee intranet site on the use of digital media in the organisation. Learners who are not employed can produce the article based on guidelines typically found in a digital media policy of a customer service organisation with which they are familiar. In their intranet article, learners will:

1. outline **two** different digital media platforms used for customer service and give reasons to support how each platform can be used in the delivery of effective customer service (AC4.1)
2. describe **three** different guidelines that may be found in an organisations' digital media policy. For each guideline, learners must show that it contributes to the appropriate use of digital media by employees in an organisation (AC4.2)
3. describe **three** ways of applying etiquette when communicating through digital media platforms (AC4.3).



# Unit 5: Communicating with Customers Effectively

<b>Level:</b>	<b>2</b>
<b>Unit type:</b>	<b>Skills</b>
<b>Guided learning hours:</b>	<b>24</b>

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## Unit introduction

As communication is such an essential part of any customer service role, it is vital that it is appropriate and effective in order to contribute to customer satisfaction and present a favourable image of the organisation. In your role, your customer interactions may cover a wide range of situations and can include face-to-face, telephone, post, email, text and social media.

In this unit, you will demonstrate the skills needed to communicate effectively with customers, using appropriate verbal, non-verbal, written and digital communication methods. You will demonstrate the use of appropriate verbal and non-verbal communication skills when delivering customer service in person and/or on the telephone. You will produce appropriate written communications that meet the needs of customers. You will use digital media to communicate with customers, for example when assisting with online customer queries and requests, in accordance with organisational digital media guidelines.

Your communications will demonstrate your skills in effective listening and questioning so that you gather information about customer needs and expectations, along with the use of summarising language to confirm understanding. Your interactions may be one-to-one or small group, and routine and non-routine situations, for example dealing with orders and payments, offering advice, guidance and support, meet-and-greet, sales, fixing problems, after care or service recovery, participating in web-chat interactions.

This unit has links to *Unit 4 Understanding Communication in a Customer Service Environment*, *Unit 6 Delivering High-Quality Customer Service* and *Unit 7 Handling Customer Conflict and Challenge*. Consideration should be given to delivering the related content together.

## Learning outcomes and assessment criteria

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	
1	Be able to communicate with customers using verbal and non-verbal communication	1.1	Use questioning skills effectively to gather information about customer needs and expectations
		1.2	Use active listening skills effectively to identify the most important information from customers
		1.3	Use verbal and non-verbal communication techniques to deliver a positive customer experience
		1.4	Adapt verbal and non-verbal communication techniques as appropriate to meet the specific or changing needs of the customer and/or the situation
		1.5	Use summarising language and/or reinforcement during customer interaction to confirm understanding
		1.6	Communicate with customers in a way that reflects organisational brand and procedures
2	Be able to communicate with customers in writing	2.1	Identify the objective(s) of written communications
		2.2	Gather the information needed to draft written communications to meet the needs of customers
		2.3	Select and use forms of written communication that are most likely to lead to customer satisfaction
		2.4	Produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone
		2.5	Use language that is clear and concise, adapting it to meet identified customer needs
		2.6	Record decisions and actions taken and the reasons for them
		2.7	Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers in writing

Learning outcomes		Assessment criteria	
3	Be able to communicate with customers using digital media	3.1	Use appropriate digital media to assist customers with routine queries and requests for products and/or services
		3.2	Use appropriate digital media to communicate and share information with customers in line with organisational and legal requirements
		3.3	Follow guidelines for using digital media when communicating information in line with digital media policy
		3.4	Apply appropriate etiquette when using different digital media platforms

## Unit content

### What needs to be learned

#### Learning outcome 1: Be able to communicate with customers using verbal and non-verbal communication

##### 1A Verbal and non-verbal communication

- Using verbal and non-verbal communication skills appropriate to the situation:
  - appropriate tone of voice
  - body language appropriate to the situation
  - questioning techniques appropriate to the situation
  - effective listening skills
  - positive customer service language: words that convey support and develop confidence and reassurance, e.g. 'I can', 'I will ensure', 'I understand'.

##### 1B Adapting non-verbal communication techniques to meet specific needs of customers

- Adapting verbal or non-verbal communication, e.g. listen and assess reactions, observe and mirror behaviours, repeat and summarise, use language, tone, pace and level of formality appropriate to different audiences.
- Adapting tone of voice and behaviours, i.e. listen to customers and observe their behaviours and change tone of voice and behaviours accordingly to match customers' needs and expectations, e.g. adjusting level of simplicity or complexity, mirroring customers' vocal style.

##### 1C Summarising and reinforcement techniques

- Using summarising techniques appropriately, e.g. to confirm own understanding of customer needs, note important points or actions to be taken, bring the conversation to a close.
- Using verbal and non-verbal reinforcement techniques, e.g. uses positive words of encouragement, paraphrasing, non-verbal gestures such as nodding.

## Learning outcome 2: Be able to communicate with customers in writing

### 2A Written communications

- Appropriate standards:
  - selecting appropriate/effective format
  - appropriate/effective use of language
  - following organisational requirements and procedures, e.g. data protection
  - circulation and recording.
- Communicating appropriately and professionally:
  - identifying customers' needs and expectations
  - adapting language to meet the individual customer's needs
  - adapting appropriately depending on audience/situation including, level of formality and presentation, meeting the specific needs of customers, e.g. large print, Braille.
- Organisational policies and procedures, legal and ethical requirements:
  - policies and procedures covering written communication in their organisation
  - legal – GDPR, avoiding discrimination, consumer protection legislation, etc.
  - ethical – not promising things that cannot be delivered, being honest and truthful.

## **Learning outcome 3: Be able to communicate with customers using digital media**

### **3A Digital communication**

- Using different types of digital media platforms and tools to deliver customer service, e.g. databases, office systems, blogs, vlogs, email and mass email tools, SMS, live chat, video chat, Skype, responding to customer queries, orders or reviews through organisational web pages, social media channels, other collaborative tools, including web conferencing and website communities.

### **3B Using appropriate web-based digital technology to deliver customer service**

- Using passwords and other security measures required appropriately for use of digital media.
- Appropriateness of tools and conventions.
- Adhering to confidentiality and security requirements for different digital media platforms.
- Choosing digital media appropriate to the situation.

### **3C Digital media guidelines**

- Following digital media guidelines, e.g. confidentiality, standards of behaviour, privacy settings, use of personal information, copyright compliance, responding to competitors or negative reviews.
- Using appropriate etiquette:
  - appropriate language used for subject and audience, e.g. formal, informal
  - checking the information that can be communicated, e.g. confidentiality
  - acceptable amount of time in replying to customer posts, e.g. SLA
  - appropriate use of media, e.g. video, pictures, text.

## Essential information for tutors and assessors

### Essential resources

There are no special resources needed for this unit.

### Assessment

This unit is internally assessed. To pass this unit the evidence that the learner presents for assessment must demonstrate that they have met the required standard specified in the learning outcomes and assessment criteria.

This unit is expected to be assessed in the real working environment where the evidence is naturally occurring and is collected over a period of time.

Centres are responsible for deciding on the assessment activities that will enable learners to produce valid, sufficient, authentic and appropriate evidence to meet the assessment criteria. When planning assessment and evidence collection for this unit, centres should consider how the nature and sources of evidence can support the end-point assessment components, notably the observation.

Before the assessment takes place, learners must be given a clear assessment brief, detailing:

- the assessment activity and context
- the learning outcome(s) to be assessed
- the criteria they are expected to meet
- the time and duration of the assessment.

Wherever possible, centres should adopt a holistic and integrated approach to assessing the skills units in the qualification. This gives the assessment process greater rigour, minimises repetition and saves time. The focus should be on assessment activities generated through naturally occurring evidence in the workplace, rather than on specific tasks. Taken as a whole, the evidence must show that the learner meets all learning outcomes and assessment criteria over a period of time. It should be clear in the assessment records where each learning outcome and assessment criterion has been covered and achieved.

Please refer to our guidance on selecting suitable assessment activities for the skills units, available on our website.



# Unit 6: Delivering High-Quality Customer Service

<b>Level:</b>	<b>2</b>
<b>Unit type:</b>	<b>Skills</b>
<b>Guided learning hours:</b>	<b>23</b>

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## Unit introduction

Providing high-quality customer service is vital in any customer-focused sector as it ensures that customers remain loyal and return in the future. The level of customer service provided by an organisation can set it apart from its competitors.

Your core responsibility will be to provide a consistent, high-quality service to customers, delivered from the workplace, digitally, or through going out into the customer's locality. These may be one-off or routine contacts and include dealing with orders and payments, offering advice, guidance and support, meet-and-greet, sales, fixing problems, after care, service recovery or gaining insight through measuring customer satisfaction. You may be the first point of contact and work in any sector or organisation type.

In this unit, you will demonstrate your ability to follow customer service delivery systems and procedures to meet or exceed customer expectations. You will take appropriate actions and show willingness, and a proactive approach, when making initial contact with customers. You will use effective questioning and listening skills to identify the products and services your customers need. You will apply your knowledge of different types of customer to adapt your service approach, actions and behaviours to meet individual customer needs, including those protected under current equality law. You will prepare the resources needed, such as IT or point-of-sale equipment, ensuring that you are ready to deliver service when necessary. You will demonstrate the effectiveness of your customer service skills in different situations, meeting customer needs over and over again!

This unit has strong links with *Unit 2 Understanding How to Deliver High Quality Customer Service*. Consideration should be given to delivering the related content together.

## Learning outcomes and assessment criteria

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	
1	Be able to identify customer needs and expectations through effective engagement	1.1	Identify when customers require attention in a timely manner
		1.2	Use appropriate organisational greetings and formalities when making initial contact with customers
		1.3	Use a range of interpersonal communication skills in a way that builds rapport and is appropriate to the situation
		1.4	Use questioning skills to gather information about customer needs and expectations
		1.5	Use active listening skills to identify the most important information from customers
		1.6	Confirm own and customer's understanding of the needs and expectations
		1.7	Provide responses appropriate to the situation and in accordance with organisational policies and standards
		1.8	Balance conflicting demands for your attention while maintaining rapport with customer(s) you are interacting with

Learning outcomes		Assessment criteria	
2	Be able to effectively meet the varying needs of customers through effective engagement	2.1	Take responsibility for meeting customer needs and expectations from first contact
		2.2	Promote the features and benefits of products and/or services that are likely to meet customer and organisational needs
		2.3	Give customers clear reasons how product and/or service options meet their needs
		2.4	Provide appropriate explanations to customers when their needs/expectations cannot be met and suggest alternative suitable options
		2.5	Adapt service approach to meet the needs and expectations of different types of customers in different customer situations
		2.6	Treat customers as individuals to provide a personal customer service experience
		2.7	Acknowledge customer objections in a positive and professional manner and take appropriate action to maintain customer relationships
		2.8	Confirm that customers' expectations have been met in line with organisational needs and expectations
3	Be able to use appropriate systems, equipment and resources in the delivery of customer service	3.1	Prepare resources that are necessary to support delivery of consistently high-quality customer service
		3.2	Make effective use of systems, equipment and/or technology to meet the needs of customers

## Unit content

### What needs to be learned

#### Learning outcome 1: Be able to identify customer needs and expectations through effective engagement

##### 1A Welcoming and greeting customers

- Being approachable, e.g. use of organisational greeting and formalities.
- Using a professional approach:
  - demonstrating behaviours in line with organisational code of conduct/standards
  - appropriate workwear and personal presentation (e.g. clean and tidy)
  - using organisational greeting and formalities
  - positive language.
- Making initial contact, including recognising when customers require attention and offering help in a timely manner, using positive language and attitude.
- Using interpersonal communication skills to build rapport, e.g. positive and reinforcing body language, appropriate active listening skills and questioning skills, showing empathy, mirroring and matching body language, being open and genuine, appropriate use of verbal communication techniques, treating disagreements constructively.
- Balancing conflicting demands, e.g. interruptions from colleagues, phone calls, other customers requiring attention.

##### 1B Effective questioning and listening skills

- Effective use of open, closed and probing questions at the appropriate times, e.g. using open questions to obtain information from customers, checking understanding (clarifying).
- Use of effective listening skills, e.g. being attentive, allowing customers to speak without interruption, taking notes, repeating back to confirm understanding.
- Use of empathetic listening:
  - understanding the feelings and emotions of the customer
  - providing responses relevant to the situation, e.g. customers with special requirements, difficult customers, dealing with complaints.

**Learning outcome 1: Be able to identify customer needs and expectations through effective engagement (*continued*)**

**1C Providing appropriate responses**

- Providing accurate information to meet customer needs, e.g. identifying right products/services that meets customer needs.
- Giving accurate information on products/services, e.g. features, benefits, functionality, price, availability, refund, exchange and complaints procedures.
- Responding positively, with empathy, to customer concerns.
- Using summarising techniques appropriately, e.g. to confirm own understanding of customer needs, note important points or actions.
- Closing communication using appropriate closing formalities, wording and agreeing next steps.

## **Learning outcome 2: Be able to effectively meet the varying needs of customers through effective engagement**

### **2A Providing a personalised customer experience**

- Delivering a personalised customer experience:
  - putting customers at the heart of the service culture
  - understanding, meeting or exceeding customer needs and expectations.
- Using a service approach to manage internal and external customer relationships positively.
- Establishing customer needs and expectations through actively listening, use of open and closed questions to gather information about customer needs and expectations, showing empathy towards customers' points of view, building rapport.
- Delivering a customer-focused experience through establishing customer needs, targeting product and/or services to meet those needs, using listening and questioning skills to enable selection of most suitable product/service, being positive and helpful, adapting service approach and communication to meet specific needs.

### **2B Promoting products and services to meet customer needs**

- Applying the selling cycle, e.g. identifying potential sales opportunities, approaching the customer, establishing customer needs, presenting the product and/or service, negotiating, handling objections, add-ons/link sales/up-selling, closing the sale/after-sales options, payment process.
- Having an understanding of organisational product and service delivery:
  - product prices, components, usage, delivery, replenishment, returns, quantities, after-sales, payment
  - organisational information, e.g. contact details, service windows, branches, structure
  - service levels, e.g. response times, politeness, individual attention, complaints and returns procedures.

## **Learning outcome 2: Be able to effectively meet the varying needs of customers through effective engagement (*continued*)**

- Selling skills:
  - use of appropriate and clear descriptions
  - offering something more than expected
  - educating the customer about suitable products and/or services.
- Use of promotion techniques, e.g. AIDA model (Attention/Awareness, Interest, Desire, Action), questioning, communication style, offering discounts/incentives, explaining benefits, making the customer want the product/service.
- Using techniques for overcoming barriers and objections, e.g. reinforcing features and benefits, adapting behaviour to audience requirements, showing respect for customers and understanding and empathising with their views.

### **2C Adapting customer service skills and behaviours**

- Showing awareness of equality and diversity, including complying with equality legislation communicating in an open, fair and respectful manner, providing services and facilities that are equally accessible, delivering products and/or services free from harassment, bullying or discrimination.
- Recognising different needs and priorities of customers:
  - needs vary according to type of customer, e.g. internal or external, customers with protected characteristics
  - customers with specific requirements, e.g. time scales.

### **2D Meeting customer needs and expectations**

- Managing customer expectations, e.g. communicate any aspects that cannot be delivered, explaining why.
- Building trust with a customer, e.g. listening, being respectful, meeting promises, or timeliness, exceeding expectations, being up front and honest, admitting mistakes.

### **Learning outcome 3: Be able to use appropriate systems, equipment and resources in the delivery of customer service**

#### **3A Preparing resources**

- Resources that support high-quality customer service delivery, e.g. product/service information, marketing/promotional information, customer information, internal user guides/manuals, operating procedures, scripts relevant to direct debit guarantees, distance selling; staffing information – daily schedules/staff rota.

#### **3B Effective use of systems, equipment and/or technology**

- Examples of systems, equipment and/or technology that can be used to deliver customer service and the customer service practitioner's role in their use:
  - using point of sale equipment to read different payment cards, take payments, carry out refunds, search for information relating to products and/or services, cash up, check stock availability
  - using self-service points to search for products and/or services, take payment
  - using IT systems, to set up customer accounts and contracts, search for information relating to products and/or services, print information relating to products and/or services, send and receive emails, contribute to Customer Relationship Management (CRM)
  - using organisation web pages to retrieve orders or queries relating to products and/or services, review comments and feedback, provide real-time online support, update product and/or service information, access policies and procedures
  - using telecommunications to handle incoming and outgoing calls from and to customers/other departments or branches, transfer customers to others, deliver an announcement over the tannoy, manage switchboards, pick up voicemail messages
  - using trade specific systems, equipment and technology, e.g. handheld order devices, card swipe systems, catering equipment.
- Complying with data protection legislation including confidentiality, information security and storage of customer records.
- Complying with organisational security requirements for protecting premises, equipment, stock and cash.

## Essential information for tutors and assessors

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### Essential resources

There are no special resources needed for this unit.

### Assessment

This unit is internally assessed. To pass this unit the evidence that the learner presents for assessment must demonstrate that they have met the required standard specified in the learning outcomes and assessment criteria.

This unit is expected to be assessed in the real working environment where the evidence is naturally occurring and is collected over a period of time.

Centres are responsible for deciding on the assessment activities that will enable learners to produce valid, sufficient, authentic and appropriate evidence to meet the assessment criteria. When planning assessment and evidence collection for this unit, centres should consider how the nature and sources of evidence can support the end-point assessment components, notably the observation and showcase, for example using reflection in their identifying and meeting of customer needs and expectations and the handling of objections would support the showcase requirements.

Before the assessment takes place, learners must be given a clear assessment brief, detailing:

- the assessment activity and context
- the learning outcome(s) to be assessed
- the criteria they are expected to meet
- the time and duration of the assessment.

Wherever possible, centres should adopt a holistic and integrated approach to assessing the skills units in the qualification. This gives the assessment process greater rigour, minimises repetition and saves time. The focus should be on assessment activities generated through naturally occurring evidence in the workplace, rather than on specific tasks. Taken as a whole, the evidence must show that the learner meets all learning outcomes and assessment criteria over a period of time. It should be clear in the assessment records where each learning outcome and assessment criterion has been covered and achieved.

Please refer to our guidance on selecting suitable assessment activities for the skills units that is available on our website.



# Unit 7: Handling Customer Conflict and Challenge

<b>Level:</b>	<b>2</b>
<b>Unit type:</b>	<b>Skills</b>
<b>Guided learning hours:</b>	<b>22</b>

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## Unit introduction

Being able to resolve customer service issues, problems and complaints is an important part of any customer service role. It is essential that customer service issues are resolved correctly and effectively. This is to provide customer satisfaction, meet the needs and expectations of the customer, and present a favourable image of the organisation.

In this unit, you will explore the different types of challenging customers and challenging situations that may give rise to a complaint, how situations can make customers agitated or angry, and how to resolve them. You will gain an understanding of why organisations have customer service and complaints procedures, and the benefits of having them in place. You will demonstrate your skills in resolving situations of conflict and challenge using appropriate actions and behaviours. This will involve knowing when to seek help and who from, when and why to escalate issues and who to, and available signposting options. You will demonstrate skills to enable you to manage situations where conflict and challenge cannot be resolved. You will also give customers information on alternative options inside and outside the organisation.

This unit has strong links to *Unit 4 Understanding Communication in a Customer Service Environment*, *Unit 5 Communicating with Customers Effectively* and *Unit 6 Delivering High Quality Customer Service*. Consideration should be given to delivering the related content together.

## Learning outcomes and assessment criteria

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	
1	Understand how to handle situations of customer conflict and challenge in your role	1.1	Describe causes for customer dissatisfaction in your organisation that could lead to potential conflict and/or challenging situations
		1.2	Describe organisational procedures and standards of behaviour when handling conflict and challenging customers
		1.3	Explain the benefits of having organisational processes for handling customer complaints
		1.4	Describe techniques for handling situations where customers and/or customer situations become challenging
		1.5	State limits of own authority for resolving customer problems and/or complaints and when these should be escalated
2	Be able to resolve situations of customer conflict or challenge in line with relevant organisational policies and/or procedures	2.1	Identify the signs and signals from the customer that indicate a change in service approach is required
		2.2	Show patience, calmness and empathy when dealing with a situations of customer conflict or challenge
		2.3	Demonstrate an understanding of the customer's point of view
		2.4	Identify workable resolution options that balance the needs of the customer and organisation
		2.5	Agree a resolution option that meets the customer's needs and expectations
		2.6	Seek help from colleagues when options for action are beyond their level of authority
		2.7	Communicate clearly next steps and/or actions to the customer
		2.8	Keep the customer informed of progress in a timely manner using agreed channels of communication

Learning outcomes		Assessment criteria	
		2.9	Confirm with the customer that their needs and expectations have been fully met
		2.10	Keep up-to-date and accurate customer service records in line with organisational complaints policy and procedures
3	Be able to manage situations of customer conflict or challenge that cannot be resolved	3.1	Provide the customer with an explanation for why the situation cannot be resolved
		3.2	Refer the customer to other sources of help when their issues cannot be resolved

## Unit content

### What needs to be learned

#### Learning outcome 1: Understand how to handle situations of customer conflict and challenge in your role

##### 1A Conflict and/or challenging situations

- Causes of customer dissatisfaction that may lead to conflict:
  - products/services, e.g. quality, delivery problems, damage, price
  - customer error, e.g. lack of understanding of company policies, procedures, pricing
  - lack of customer service training
  - poor communication (colleagues, customers)
  - inadequate customer service systems or procedures to support effective customer service, e.g. complex telephone systems
  - staff problems (poor service delivery, poor attitude, poor behaviour, unclear lines of responsibilities and levels of authority, staff shortages, competence levels and/or lack of product/service knowledge, lack of incentives, use of jargon and/or abbreviations, personal issues affecting service)
  - unmanageable and restrictive organisational policies and procedures, e.g. restrictions on ability of staff to make decisions, refunds and exchanges
  - complications and limitations caused by legislation/regulations, e.g. data protection processes
  - ethical issues and their effect on community and environment, e.g. fair trade, use of child labour, single-use packaging.

##### 1B Customer service policies and procedures for resolving conflict and challenge

- Purpose of customer complaints policy and procedures.
- Features of complaints procedure, e.g. formalised process, escalation points, roles and responsibilities, limits of authority, approved documentation to record actions/outcomes.
- Benefits of following policies and procedures in customer service delivery, including provision of consistent service, maintaining service quality, compliance with legislation and regulations.
- Limits of own authority based on limits of job role (job description), organisational procedures, organisation's lines of authority and responsibility.

## **Learning outcome 1: Understand how to handle situations of customer conflict and challenge in your role (*continued*)**

### **1C Reasons to use a customer complaints process**

- Customers feel reassured and confident when dealing with organisation, obtaining products, using services, recommending to friends and family.
- Organisational benefits, e.g. identifies areas of weakness, drives change to improve service, limits further damage to organisation's reputation.
- Keeping colleagues informed:
  - enables a full picture to be given and any actions agreed and taken so far with the customer
  - helps to maintain organisation's reputation with customers
  - supports organisational procedures for dealing with customers
  - helps to retain customer base and keep customers loyal
  - enables managers to be kept fully informed and enables effective decision making in relation to escalation.

### **1D Challenging customers and their behaviours**

- Different types of challenging customers, e.g., impatient, dissatisfied, indecisive, argumentative, overly assertive/intimidating, customers with language or cultural needs, customers with special needs (visual impairment, hearing or physical impairments), talkative customers, groups of customers.
- Challenging behaviour from customers, e.g. arguing with staff, questioning staff competence, demanding impossible solutions, not accepting limitations and procedures, making inappropriate personal comments, angry behaviours.
- Procedures and standard of behaviours when handling challenging customers:
  - staying calm and polite
  - listening carefully
  - empathising with how the person is feeling
  - apologising sincerely for problems
  - offering solutions but not overpromising
  - using questioning techniques
  - seeking help from a colleague.

**Learning outcome 1: Understand how to handle situations of customer conflict and challenge in your role (*continued*)**

- Techniques to deal with customer conflict and challenge:
  - staying calm and polite, defusing emotions to make conversation more productive, e.g. reassuring customers that you want to help them, empathising, acknowledging the issue
  - giving customers the opportunity to speak and listening carefully, asking open-ended and probing questions as appropriate and necessary
  - showing respect for customers' views and apologising sincerely for any problems
  - focusing on helping the customer in a positive way
  - focusing on the outcome wanted.

**1E Escalations requirements and procedures**

- When to escalate – limits of own authority, limits of knowledge, losing control of the situation, poor level and speed of progress.
- How to escalate – follow organisational policies.
- Who to escalate to, based on, e.g. level of authority, level of expertise/knowledge, availability, type of situation.

## **Learning outcome 2: Be able to resolve situations of customer conflict or challenge in line with relevant organisational policies and/or procedures**

### **2A Dealing with situations of customer conflict and challenge**

- Techniques to identify customer service problems or complaints and their causes, e.g. feedback from customer, staff and systems, auditing, customer surveys, complaints.
- Interpreting verbal and non-verbal signs and signals that tell you the customer is dissatisfied, or the situation is challenging, e.g. body language, tone of voice, hand gestures.
- Techniques to deal with customers' challenging behaviours:
  - appreciate the customer's stance and adjust your frame of mind to be able to help the customer in a positive sense
  - build a rapport and empathise
  - change the environment e.g. moving chairs, moving to a quieter/more peaceful location to calm the situation
  - defuse the emotion
  - ask open questions
  - focus on the outcome wanted
  - develop and agree a solution
  - highlight and agree the next steps with the customer.

### **2B Expressing understanding of the customer point of view**

- Where customers express their point of view, e.g. customer expectations, quality of products and/or services, standard and speed of service, policies, procedures and regulations, responsiveness to problems and complaints, inaccurate or insufficient information, expected solutions.
- Customer awareness:
  - situational awareness – you get 'it'
  - personal awareness – you get them
  - solution awareness – understand how to progress their position.
- Understanding the customer's' point of view:
  - listening carefully
  - empathising with how the customer is feeling
  - apologising sincerely for problems
  - offering solutions but not overpromising
  - using questioning techniques.

**Learning outcome 2: Be able to resolve situations of customer conflict or challenge in line with relevant organisational policies and/or procedures (continued)**

- Using appropriate communications skills and techniques:
  - verbal and non-verbal communications skills
  - positive language and behaviours
  - verbal communication techniques.

**2C Options for resolving customer situations of conflict and challenge**

- Taking ownership through showing personal commitment, e.g. not passing the customer on unless necessary, being resourceful to acquire information needed to find a resolution, following issues until they are resolved, escalating in a timely manner when appropriate to do so, requesting assistance from colleagues and other departments.
- Identifying options for resolving situations of conflict and challenge, which are mutually beneficial for the organisation and the customer.
- Balancing the needs of customer and organisation:
  - operating within organisational limitations
  - meeting organisational objectives
  - suggesting alternatives, offering concessions
  - signposting to other departments or organisations.
- Resolutions to meet customer's needs, e.g. refund payments, exchange product, replace product and or service, repair product, offer alternative product and/or service, offer goodwill gestures such as discounts, gift vouchers.
- Providing resolutions for challenging situations:
  - within organisational policies and procedures and within the remit of own responsibility
  - working with others to help when options for action are beyond their level of authority
  - offering solutions but not overpromising
  - agreeing solution and next steps with the customer.
- Keeping customers informed of progress, e.g. frequency of updates, communication method used, updating customers even when there is no progress to report, keeping customers reassured that service recovery is still ongoing, advising of next steps in the process.

**Learning outcome 2: Be able to resolve situations of customer conflict or challenge in line with relevant organisational policies and/or procedures  
(continued)**

**2D Maintaining contact with customers during service recovery**

- Maintaining contact with customers:
  - regular communication
  - agreed time and date of communications
  - keep customers informed of progress, e.g. delivery date and time, resolution of problems or complaints
  - checking customer satisfaction.
- Methods of communication, e.g. face-to-face, telephone, email, written, web chat.
- Checking customer satisfaction levels throughout process and confirming that the customer is happy to close a complaint as it has been resolved to their satisfaction.
- Maintaining accurate and timely records in line with organisational policy and procedures, e.g. complaints log, updated customer relationship management records.

### **Learning outcome 3: Be able to manage situations of customer conflict or challenge that cannot be resolved**

#### **3A Managing customer expectations**

- Reasons why customer situations cannot be resolved, e.g. product/service not offered by the organisation, customer expectations do not balance the needs of organisation, unacceptable customer behaviours.
- Being polite and showing empathy in explanation of why situation cannot be resolved.
- Applying escalation procedures.

#### **3B Signposting customers when required**

- Reasons for referring or signposting customers, e.g. to be in line with organisational escalation procedures, when dealing with a complaint, required action is outside area of responsibility or authority, when there is a lack of knowledge or experience, when specialist support is needed.
- Signposting techniques, e.g. information needs (a website where information can be found, a telephone number for a helpline, the name and address of an organisation that can provide the required support), customer referral, colleagues or managers, other departments, other branches, external organisations, industry regulators or ombudsmen.

## Essential information for tutors and assessors

### Essential resources

There are no special resources needed for this unit.

### Assessment

This unit is internally assessed. To pass this unit the evidence that the learner presents for assessment must demonstrate that they have met the required standard specified in the learning outcomes and assessment criteria.

This unit is expected to be assessed in the real working environment where the evidence is naturally occurring and is collected over a period of time.

Centres are responsible for deciding on the assessment activities that will enable learners to produce valid, sufficient, authentic and appropriate evidence to meet the assessment criteria. When planning assessment and evidence collection for this unit, centres should consider how the nature and sources of evidence can support the end-point assessment components, notably, the showcase, for example reflection on competencies in resolving conflict and challenge would support the requirements of the showcase.

Before the assessment takes place, learners must be given a clear assessment brief, detailing:

- the assessment activity and context
- the learning outcome(s) to be assessed
- the criteria they are expected to meet
- the time and duration of the assessment.

Wherever possible, centres should adopt a holistic and integrated approach to assessing the skills units in the qualification. This gives the assessment process greater rigour, minimises repetition and saves time. The focus should be on assessment activities generated through naturally occurring evidence in the workplace, rather than on specific tasks. Taken as a whole, the evidence must show that the learner meets all learning outcomes and assessment criteria over a period of time. It should be clear in the assessment records where each learning outcome and assessment criterion has been covered and achieved.

Please refer to our guidance on selecting suitable assessment activities for the skills units that is available on our website.



# Unit 8: Managing Personal Effectiveness in a Customer Service Job Role

<b>Level:</b>	<b>2</b>
<b>Unit type:</b>	<b>Skills</b>
<b>Guided learning hours:</b>	<b>21</b>

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## Unit introduction

All customer service practitioners should understand how their role fits into the structure of their organisation, as well as the number of potential benefits their role brings to the organisation.

In this unit, you will gain an understanding of your organisation's structure and the role of your team within it. You will look at your role in the team and how it contributes to team objectives and benefits the organisation. You will explore the necessary knowledge, skills and behaviours that make a customer service practitioner effective, and the impact that actions and behaviours have on others in the organisation.

You will apply your positive work ethic, demonstrating that you have the right personal attributes to do your job effectively and with professionalism. You will demonstrate your ability to manage your performance in the workplace, including agreeing SMART objectives with your line manager and monitoring them, and managing workloads and time to deliver high-quality customer service, right first time.

You will look at the importance of team working and demonstrate relevant personal behaviours that enable effective team working, including supporting others in meeting customer needs and to support good customer service practice.

You will identify and take up opportunities to improve your knowledge and skills in the workplace by agreeing development objectives, carrying out self-assessment activities, producing a professional development plan (PDP), and monitoring and reviewing your plan in order to achieve development objectives.

This unit has links to *Unit 3 Understanding Personal Effectiveness in a Customer Service Work Environment*. Consideration should be given to delivering the related content together.

## Learning outcomes and assessment criteria

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	
1	Understand own role and value within the organisation	1.1	Describe the structure of your employer organisation and the role of own team within this structure
		1.2	Describe your role and responsibilities within own team
		1.3	Describe how the achievement of own targets/goals benefits own team and organisation
		1.4	Explain how own work and actions impact on others within the organisation
		1.5	Explain how the organisation's core values and service culture are upheld through own work
2	Be able to demonstrate professionalism and good work ethics in a customer service job role	2.1	Show courtesy, respect and consideration when interacting with colleagues, customers and/or stakeholders
		2.2	Demonstrate personal qualities and behaviours that reflect good work ethics within own role
		2.3	Maintain personal presentation and appearance in line with organisational code of conduct and brand standards
3	Be able to work effectively in a customer service team	3.1	Outline the benefits of effective team working
		3.2	Describe when to seek assistance/guidance from others in order to support own delivery of customer service
		3.3	Proactively support others in order to meet the needs of customers in a timely manner
		3.4	Share personal learning and information with others to support good customer service practice
		3.5	Present ideas and recommendations for improving customer service to others

Learning outcomes		Assessment criteria	
4	Be able to manage personal performance in the workplace	4.1	Agree specific, measurable, achievable, realistic and time-bound (SMART) performance objectives with line manager
		4.2	Manage own workload and time to meet deadlines using appropriate time management tools and techniques
		4.3	Respond positively to challenges/changing priorities and adapt work plan appropriately to meet these
		4.4	Monitor and assess own performance against agreed SMART objectives and success criteria on a regular basis
		4.5	Complete tasks within agreed timescales, meeting agreed objectives and quality standards
		4.6	Describe when clarification on a task(s) may be required from their line manager
5	Be able to manage own personal development in the workplace	5.1	Use relevant sources of information to update own product and/or service knowledge and skills
		5.2	Identify own strengths and weaknesses within their job role using self-assessment
		5.3	Seek constructive feedback from others about own customer service skills and knowledge
		5.4	Use feedback from others positively to identify own development needs
		5.5	Agree specific, measurable, achievable, realistic and time-bound (SMART) learning and development objectives to meet identified needs
		5.6	Produce a personal development plan to meet agreed SMART objectives
		5.7	Make use of formal and informal learning opportunities to develop customer service skills, knowledge and/or behaviours
		5.8	Review progress against agreed objectives and amend personal development plan accordingly

## Unit content

### What needs to be learned

#### Learning outcome 1: Understand own role and value within the organisation

##### 1A Understanding organisational structures

- The need for an organisational structure, i.e. defines how tasks are divided, grouped and coordinated in an organisation, helps a business run effectively and efficiently.
- Elements of organisational structures:
  - work specialisation
  - departmentalisation
  - chain of command
  - span of control
  - centralisation and decentralisation
  - formalisation.
- Types of organisational structures:
  - functional, e.g. sales, marketing, human resources, production.
  - divisional, e.g. product line, geographical location
  - matrix.
- Layers of authority, including tall or flat hierarchical structures.
- Use of organisational charts:
  - positions within the structure
  - role and reporting relationships
  - levels of authority.

##### 1B Understanding own role in an employer organisation

- Occupational profile of a customer service practitioner:
  - Apprenticeship Standard
  - person specification for own job role.
- The role of a customer service practitioner in an organisation.
- Own roles and responsibilities:
  - job description
  - own position in the organisation and its function
  - job title and duties as per job description, e.g. handling queries or complaints, communicating with customers
  - team purpose and objectives; role in the team
  - organisational chart.

## **Learning outcome 1: Understand own role and value within the organisation (continued)**

- Impact on others:
  - how their duties relate to the work of others in their immediate team/department and other functional areas within the organisation
  - consequences for other roles if duties are not completed as required, e.g. not achieving team and organisational goals and targets, poor working relationships.

### **1C Achieving customer service targets and goals**

- Own targets and goals, including individual and/or team performance goals and targets that are specific to job role and responsibilities and agreed with line manager.
- Achieving targets and goals:
  - regular one-to-one meetings with line manager to discuss issues or constraints to achieving goals and targets
  - seeking additional support or resources necessary to achieve goal
  - seeking and acting on feedback from others
  - tracking and reviewing performance in shared performance database or self-created tool, carrying out work activities in line with agreed policies, processes and regulatory requirements.

### **1D Organisational core values and service culture**

- Organisational core values:
  - definition and examples of organisational core values
  - purpose of core values in an organisation
  - how to apply organisational core values in a customer service delivery role.
- Service culture:
  - meaning of service culture
  - impact of organisational values on service culture
  - how to communicate the organisational service culture in a customer service role, e.g. dress code, interactions with customers, product knowledge, personal behaviours and attitudes.

## **Learning outcome 2: Be able to demonstrate professionalism and good work ethics in a customer service job role**

### **2A Demonstrating professionalism and good work ethics in own role**

- Showing respect, courtesy and consideration for others:
  - positive personal behaviours, including politeness and kindness, allowing others to express their views, listening to others, fairness and integrity, use of positive body language, showing concern, utilising emotional intelligence and personal awareness
  - professional courtesy, including respecting colleagues' personal time and work-life balance, showing appreciation to team members for work done, being punctual, meeting deadlines that other colleagues are depending on, timely responses to emails and calls.
- Showing respect for diversity and inclusion:
  - being tolerant and open-minded, respecting the values, beliefs and customs of colleagues
  - use of non-discriminatory language.
- Working in line with brand standards and values.
- Demonstrating good work ethics:
  - taking ownership for understanding own role, goals, responsibilities and standards for performance
  - showing commitment and taking responsibility for quality and timely completion of tasks
  - complying with organisational policies and procedures and relevant legislation, e.g. data protection, health and safety, equality in carrying out own job role
  - taking initiative and being proactive, e.g. offering to help, giving feedback
  - managing own time and tasks effectively
  - continuously updating knowledge of organisational procedures, standards and relevant regulations and legislation, e.g. asking for feedback on performance
  - developing positive working relationships with colleagues
  - building trust and reliability.

**Learning outcome 2: Be able to demonstrate professionalism and good work ethics in a customer service job role (*continued*)**

- Demonstrating professionalism:
  - personal appearance (dress code, grooming) and behaviours in line with organisational code of conduct and any industry professional requirements
  - positive language and attitude
  - being approachable, polite, calm and focused
  - positive body language appropriate to the situation, e.g. maintaining eye contact, smiling
  - welcoming tone of voice in line with organisational brand and service culture.
- Keeping up to date on organisational requirements for personal appearance and presentation e.g. speaking to line manager or human resources representatives, reading organisation code of conduct.

## Learning outcome 3: Be able to work effectively in a customer service team

### 3A Working effectively with others

- Working with others:
  - others, e.g. immediate team members, supervisors, managers, colleagues in other departments, colleagues in other branches, others external to the organisation.
- Personal behaviours:
  - communicating appropriately, depending on the situation
  - being polite, reliable and trustworthy
  - showing respect for the values, beliefs and views of others
  - willingness to learn and take instructions and directions.
- Ways of working with others effectively:
  - demonstrating professional behaviours
  - achieving shared work objectives and quality standards, e.g. meeting deadlines
  - working collaboratively, e.g. sharing workloads, sharing information and ideas
  - giving constructive feedback and accepting and acting on feedback from others, dealing with conflict.
- Communication:
  - opportunities, e.g. one-to-one, briefings, team meetings, conference calls, training sessions, email guidance, written guidance
  - appropriate (active listening, verbal communication skills and techniques, non-verbal communication skills, effective speaking)
  - timely and reliable to support others in meeting customer needs.
- Support activities:
  - how and when to seek assistance and/or guidance, e.g. resolving different customer situations such as complex queries, when a request(s) is outside own limit of authority
  - using escalation procedures
  - offering support, responding to requests for support.

**Learning outcome 3: Be able to work effectively in a customer service team  
(continued)**

- Sharing good practice and ideas:
  - offering suggestions to improve performance
  - demonstrating skills to others
  - contributions to team meetings.
- Using opportunities for sharing personal learning, e.g. meetings, reflective accounts, blogs, work shadowing, development of user guides, training sessions, organisational staff suggestions/feedback systems and processes.
- Use of lessons learned:
  - what went well
  - what went less well
  - areas for improvement
  - how it could be done differently next time
  - advice to others.

## **Learning outcome 4: Be able to manage personal performance in the workplace**

### **4A Managing personal performance in the workplace**

- Agreeing work to be completed: listening and writing down details, asking relevant questions, seeking clarification, agreeing deadlines and quality standards.
- Goal-setting:
  - agreeing SMART objectives with line manager (KPIs)
  - working with line manager to ensure alignment of objectives with organisational goals
  - relationship of personal objectives to those of team members and other colleagues.
- Agreeing success criteria for measuring progress and achievement with line manager.
- Monitoring and assessing own performance, e.g. asking for performance feedback from relevant colleagues, attending and engaging in regular one-to-one meetings.
- Actively participating in annual performance appraisal, e.g. regularly updating performance review systems, preparing evidence for discussion at meeting. applying feedback on performance to improve own work practice, using feedback from performance appraisals to inform personal development planning.

### **4B Managing time and workload**

- Importance of completing tasks on time and implications of late completion.
- Managing workload, e.g. regular review of workload, prioritising, asking colleagues for help, having a contingency plan.
- Prioritising tasks according to situation, e.g. task urgency and importance, consequence of late completion.
- Using time-management tools, e.g. calendars, schedules, diary, 'to do' list.
- Dealing with distractions and interruptions.
- Managing challenges/changes to deadlines, e.g. agree re-prioritisation with line manager.
- Re-negotiating deadlines with others, re-assessing resources, demonstrating positive, professional, behaviours, displaying flexibility, seeking help from colleagues.
- Monitoring work, checking against deadlines, accuracy and quality.

**Learning outcome 4: Be able to manage personal performance in the workplace (*continued*)**

- Completing tasks/work:
  - meeting quality standards and agreed timescales
  - reporting problems beyond own level of competence.
- Seeking clarification from line manager, e.g. nature of tasks, timescales, procedures to be followed, standards to be met.

## **Learning outcome 5: Be able to manage own personal development in the workplace**

### **5A Keeping product/service knowledge up to date**

- Sources of information for keeping up to date, e.g. pre-release product/service information, manufacturer updates and manuals, internet research, product/service specifications, internal or external training, product briefings, process guides.
- Improving own service knowledge and skills:
  - importance, e.g. career progression
  - gain personal satisfaction
  - enhance organisation's competitive position.

### **5B Identifying learning and development needs**

- Sources of information for self-assessment, e.g. feedback from others, analysis of job description, person specification and team objectives, performance reviews and appraisals, own career aspirations, organisational training plan.
- Identifying gaps in service knowledge and skills:
  - carrying out a skills audit
  - identifying strengths and weaknesses
  - using methods of feedback, e.g. formal, informal, appraisal, review.
- Constructive feedback:
  - definition, i.e. useful, meaningful, impactful
  - types (positive, negative)
  - purpose, e.g. builds relationships, reinforces good behaviour, improves undesirable behaviour.
- Potential sources of feedback, e.g. team members, line manager, senior management, other teams and departments, customers, suppliers, other stakeholders.
- Areas for feedback, e.g. personal and professional behaviours, performance targets, quality standards, achievement of learning and development goals and objectives, customer complaints, customer recognition.
- How to respond to feedback:
  - listen and ask questions to ensure understanding/request examples to illustrate the feedback
  - control emotions/being positive
  - consider the content of the feedback
  - ask for suggested ways of improving.

## **Learning outcome 5: Be able to manage own personal development in the workplace (*continued*)**

### **5C Manage own learning and development**

- Taking ownership of learning:
  - learning from own mistakes
  - proactive approach to learning and development of knowledge and skills
  - positive attitude towards learning and development and receiving feedback from others
  - taking action to address gaps in knowledge and skills.
- Different types of learning and development activities, e.g. on the job (work shadowing, coaching, mentoring, in-house training, job rotation), off the job (college, e-learning, supplier product knowledge workshops).
- Personal development planning:
  - using information from skills audit
  - identifying skills that need development
  - setting SMART objectives – specific, measurable, achievable, realistic and time-bound
  - identifying learning activities for developing these skills
  - agreeing what success looks like (evidence of success)
  - identifying any resources and support needed
  - assessing progress against objectives.
- Working with line manager or relevant others to agree the scope of development plan, agreeing a reasonable number of development areas for focus in the development plan - consideration of factors such as time, capacity and resources.
- Agreeing SMART learning and development objectives to address the agreed development areas as well as to build and leverage strengths.
- Monitoring a personal development plan:
  - setting review dates
  - recording achievements
  - recording feedback from appraisals and personal reviews
  - reviewing and revising objectives
  - tracking against targets (milestones, completion)
  - identifying reasons for deviations from plan
  - identifying exploitative or corrective actions.

## Essential information for tutors and assessors

### Essential resources

There are no special resources needed for this unit.

### Assessment

This unit is internally assessed. To pass this unit the evidence that the learner presents for assessment must demonstrate that they have met the required standard specified in the learning outcomes and assessment criteria.

This unit is expected to be assessed in the real working environment where the evidence is naturally occurring and is collected over a period of time.

Centres are responsible for deciding on the assessment activities that will enable learners to produce valid, sufficient, authentic and appropriate evidence to meet the assessment criteria. When planning assessment and evidence collection for this unit, centres should consider how the nature and sources of evidence can support the end-point assessment components, notably, the showcase, for example using reflection on performance, such as personal learning, improving product knowledge, working with others, using work products, such as PDP, self-assessment.

Before the assessment takes place, learners must be given a clear assessment brief, detailing:

- the assessment activity and context
- the learning outcome(s) to be assessed
- the criteria they are expected to meet
- the time and duration of the assessment.

Wherever possible, centres should adopt a holistic and integrated approach to assessing the skills units in the qualification. This gives the assessment process greater rigour, minimises repetition and saves time. The focus should be on assessment activities generated through naturally occurring evidence in the workplace, rather than on specific tasks. Taken as a whole, the evidence must show that the learner meets all learning outcomes and assessment criteria over a period of time. It should be clear in the assessment records where each learning outcome and assessment criterion has been covered and achieved.

Please refer to our guidance on selecting suitable assessment activities for the skills units available on our website.

## 13 Suggested teaching resources

This section lists resource materials that can be used to support the delivery of the units across the qualification(s).

### Textbooks

Barnes, R – *Customer Experience for Dummies* (Wiley Publishing, 2014) ISBN 9781118725603

Clayton M – *Time Management Pocketbook* (Management Pocketbooks, 2017) ISBN 9781910186015

Cottrell S – *Skills for Success, Personal Development and Employability*, 3rd Edition (Palgrave Macmillan, 2015) ISBN 9781137426529

Dent F – *Self-Managed Development Pocketbook* (Management Pocketbooks, 2016) ISBN 9781906610944

Harris E K – *Customer Service: A Practical Approach*, 6th Edition (Pearson Publishing, 2012) ISBN 9781292040356

Hasson G - *Brilliant Communication Skills* (Brilliant Business), (Pearson Education Ltd, 2014) ISBN 9781292081076

Hepplle M – *Five Star Service: How to deliver exceptional customer service*, 3<sup>rd</sup> Edition (Pearson Business, 2015) ISBN 9781292100203

Kay F – *Smart Skills: Working with Others* (Legend Business, 2019) ISBN 9781789550054

Lucas R W – *Customer Service Skills for Success*, 7th Edition (McGraw-Hill Higher Education, 2018) ISBN 9781260092509

O'Ciosog M – *Contact Centre CXM: Customer Service Today and Tomorrow*, 1st Edition (CreateSpace Independent Publishing Platform, 2013) ISBN 9781492267256

Stewart L, Blaikie E, Tissiman S, Smith J – *Apprenticeship Customer Service Practitioner L2 Handbook + ActiveBook* (Pearson, 2018) ISBN 1292279923

Trough F – *Brilliant Employability Skills*, 2<sup>nd</sup> Edition (Pearson FT Prentice Hall, 2017) ISBN 9781292158907

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

## Websites

<a href="http://www.businessballs.com">www.businessballs.com</a>	Information on different business-related topics suited to this unit, such as complaint letters, body language, customer service, and games to improve skills and understanding of relevant topics.
<a href="http://www.businesstrainingworks.com">www.businesstrainingworks.com</a>	includes information on customer service language
<a href="http://www.gov.uk">www.gov.uk</a>	Official government website that explains legislation
<a href="http://www.hse.gov.uk">www.hse.gov.uk</a>	Health and Safety Executive information on all aspects of health and safety
<a href="http://www.ico.org.uk">www.ico.org.uk</a>	Information Commissioners Office, information regarding data protection legislation
<a href="http://www.instituteofcustomerservice.com">www.instituteofcustomerservice.com</a>	Independent, professional membership body for the customer service sector. Includes a resources section where a glossary of terms, downloadable resources and guidance notes are available.
<a href="http://www.managementhelp.org">www.managementhelp.org</a>	Information on customer service branding needs, basic customer service.
<a href="http://www.marketing.about.com">www.marketing.about.com</a>	Information on good customer service.
<a href="http://www.mindtools.com">www.mindtools.com</a>	Provides a wide range of learning resources, with some resources on personal and professional development.
<a href="http://www.ofcom.org.uk">www.ofcom.org.uk</a>	Information on legislation and regulation from Ofcom, the independent regulator and competition authority for the UK communications industry.
<a href="http://www.skillsyouneed.com">www.skillsyouneed.com</a>	Information on customer service skills and skills needed for life, personal and work development.

## 14 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](https://qualifications.pearson.com/en/support/contact-us.html)
- Books, software and online resources for UK schools and colleges:  
[www.pearsonschoolsandfecolleges.co.uk](http://www.pearsonschoolsandfecolleges.co.uk)

Key publications

- *Access arrangements and reasonable adjustments* (Joint Council for Qualifications (JCQ))
- *A guide to recruiting learners onto Pearson qualifications* (Pearson)
- *A guide to the special consideration process* (JCQ)
- *WBL Quality Assurance handbooks*
- *Collaborative and consortium arrangements for the delivery of vocational qualifications policy* (Pearson)
- *Enquiries and appeals about Pearson vocational qualifications and end point assessment policy* (Pearson)
- *Equality, diversity and inclusion policy* (Pearson)
- *Recognition of prior learning policy and process* (Pearson)
- *Guidance for reasonable adjustments and special consideration in vocational internally assessed units* (Pearson)
- *Suspected malpractice in examinations and assessments – Policies and procedures* (JCQ)
- *UK Information Manual* (Pearson)
- *Use of languages in qualifications policy* (Pearson).

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.

# 15 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.

The national programme of training we offer is on our website. You can request centre-based training through the website or you can contact one of our advisers in the Training from Pearson UK team via Customer Services to discuss your training needs.

## **BTEC training and support for the lifetime of the qualifications**

**Training and networks:** our training programme ranges from free introductory events through sector-specific opportunities to detailed training on all aspects of delivery, assignments and assessment. We also host some regional network events to allow you to share your experiences, ideas and best practice with other BTEC colleagues in your region.

**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.

To get in touch with our dedicated support teams please visit our website.

## **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](https://qualifications.pearson.com/en/support/contact-us.html)

## Annexe A

### Mapping of the Customer Service Practitioner Apprenticeship Standard to the qualification(s) content

The grid below maps the knowledge, skills and behaviours (KSBs) of the Customer Service Practitioner Apprenticeship Standard to the content covered in the Pearson BTEC Level 2 Certificate and Diploma for Customer Service Practitioners.

**Please note: only units 1–4 are part of the Certificate structure.**

#### KEY

# indicates coverage of the knowledge, skills or behaviours in the qualification.

A blank space indicates no coverage of the knowledge, skills or behaviours in the qualification.

KSBs from the Apprenticeship Standard		Pearson BTEC Level 2 Certificate and Diploma for Customer Service Practitioners							
		Unit 1	Unit 2	Unit 3	Unit 4	Unit 5	Unit 6	Unit 7	Unit 8
Knowledge	<b>Knowing your customers</b> <ul style="list-style-type: none"> <li>Understand who customers are.</li> <li>Understand the difference between internal and external customers.</li> <li>Understand the different needs and priorities of your customers and the best way to manage their expectations, recognising and knowing how to adapt style to be highly effective.</li> </ul>		#						
	<b>Understanding the organisation</b> <ul style="list-style-type: none"> <li>Know the purpose of the business and what 'brand promise' means.</li> <li>Know your organisation's core values and how they link to the service culture.</li> <li>Know the internal policies and procedures, including any complaints processes and digital media policies that are relevant to you and your organisation.</li> </ul>	#							

KSBs from the Apprenticeship Standard		Pearson BTEC Level 2 Certificate and Diploma for Customer Service Practitioners							
		Unit 1	Unit 2	Unit 3	Unit 4	Unit 5	Unit 6	Unit 7	Unit 8
Knowledge (continued)	<b>Meeting regulations and legislation</b> <ul style="list-style-type: none"> <li>Know the appropriate legislation and regulatory requirements that affect your business.</li> <li>Know your responsibility in relation to this and how to apply it when delivering service.</li> </ul>	#							
	<b>Systems and resources</b> <ul style="list-style-type: none"> <li>Know how to use systems, equipment and technology to meet the needs of your customers.</li> <li>Understand types of measurement and evaluation tools available to monitor customer service levels.</li> </ul>		#				#		
	<b>Your role and responsibility</b> <ul style="list-style-type: none"> <li>Understand your role and responsibility within your organisation and the impact of your actions on others.</li> <li>Know the targets and goals you need to deliver against.</li> </ul>							#	
	<b>Customer experience</b> <ul style="list-style-type: none"> <li>Understand how establishing the facts enable you to create a customer focused experience and appropriate response.</li> <li>Understand how to build trust with a customer and why this is important.</li> </ul>		#						
	<b>Product and service knowledge</b> <ul style="list-style-type: none"> <li>Understand the products or services that are available from your organisation and keep up-to-date.</li> </ul>	#						#	
Skills	<b>Interpersonal skills</b> Use a range of questioning skills, including listening and responding in a way that builds rapport, determines customer needs and expectations and achieves positive engagement and delivery.					#	#		
	<b>Communication</b> <ul style="list-style-type: none"> <li>Depending on your job role and work environment:               <ul style="list-style-type: none"> <li>use appropriate verbal and non-verbal communication skills, along with summarising language during face-to-face communications; <b>and/or</b></li> <li>use appropriate communication skills, along with reinforcement techniques (to confirm understanding) during non-facing customer interactions.</li> </ul> </li> <li>Use an appropriate 'tone of voice' in all communications, including written and digital, that reflect the organisation's brand.</li> </ul>					#			

KSBs from the Apprenticeship Standard		Pearson BTEC Level 2 Certificate and Diploma for Customer Service Practitioners							
		Unit 1	Unit 2	Unit 3	Unit 4	Unit 5	Unit 6	Unit 7	Unit 8
Skills (continued)	<b>Influencing skills</b> <ul style="list-style-type: none"> <li>Provide clear explanations and other options in order to help customers make choices that are mutually beneficial to both the customer and your organisation.</li> </ul>						#		
	<b>Personal organisation</b> <ul style="list-style-type: none"> <li>Be able to organise yourself, prioritise your own workload/activity and work to meet deadlines.</li> </ul>								#
	<b>Dealing with customer conflict and challenge</b> <ul style="list-style-type: none"> <li>Demonstrate patience and calmness.</li> <li>Show you understand the customer's point of view.</li> <li>Use appropriate sign-posting or resolution to meet your customers needs and manage expectations.</li> <li>Maintain informative communication during service recovery.</li> </ul>							#	

KSBs from the Apprenticeship Standard		Pearson BTEC Level 2 Certificate and Diploma for Customer Service Practitioners							
		Unit 1	Unit 2	Unit 3	Unit 4	Unit 5	Unit 6	Unit 7	Unit 8
Behaviours	<b>Developing self</b> <ul style="list-style-type: none"> <li>Take ownership for keeping your service knowledge and skills up-to-date.</li> <li>Consider personal goals and propose development that would help achieve them.</li> </ul>			#					#
	<b>Being open to feedback</b> Act on and seek feedback from others to develop or maintain personal service skills and knowledge			#					#
	<b>Team working</b> <ul style="list-style-type: none"> <li>Frequently and consistently communicate and work with others in the interest of helping customers efficiently.</li> <li>Share personal learning and case studies with others, presenting recommendations, and improvement to support good practice.</li> </ul>			#		#			#
	<b>Equality – treating all customers as individuals</b> <ul style="list-style-type: none"> <li>Treat customers as individuals to provide a personalised customer service experience.</li> <li>Uphold the organisations core values and service culture through your actions.</li> </ul>				#	#	#	#	
	<b>Presentation – dress code, professional language</b> Demonstrate personal pride in the job through appropriate dress and positive and confident language.			#					#
	<b>“Right first time”</b> <ul style="list-style-type: none"> <li>Use communication behaviours that establish clearly what each customer requires and manage their expectations.</li> <li>Take ownership from the first contact and then take responsibility for fulfilling your promise.</li> </ul>		#				#		

## Annexe B

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### Glossary of terms used in assessment criteria

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Compare	Identify the main factors relating to two or more items/situations, explain the similarities and differences, and in some cases say which is best and why.
Define	Specify exactly the meaning, nature or scope of something. The use of correct terminology is expected.
Describe	Give a clear account in their own words, including all the relevant information (e.g. qualities, characteristics or events, etc.). Description shows recall and in some cases application.
Detailed	Having additional facts or information beyond a simple response.
Explain	Provide details and give reasons and/or evidence to support an argument or point. OR Provide details and give relevant examples to clarify and extend a point. This would usually be in the context of learners showing their understanding of a technical concept or principle.
Identify	Shows the main features or purpose of something. Can recognise it and/or name characteristics or facts that relate to it.
List	Presentation of specific, required information in a structured format. Essentially a recall of learned information, although this can be quite complex information.
Outline	A description setting out the main characteristics or points; write a clear description but without going into too much detail
State	Express information in clear and precise terms.

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