

Pearson Edexcel Level 1 NVQ Certificate in Contact Centre Operations

Pearson Edexcel Level 2 NVQ Certificate in Contact Centre Operations

Pearson Edexcel Level 3 NVQ Diploma in Contact Centre Operations

Specification

NVQ/competence-based qualifications

First registration April 2011

Issue 3

Edexcel, BTEC and LCCI qualifications

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This specification is Issue 3. Changes are detailed in the summary table on the next page. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: qualifications.pearson.com

These qualifications were previously known as:

Edexcel Level 1 NVQ Award and Certificate in Contact Centre Operations (QCF)

Edexcel Level 2 NVQ Certificate in Contact Centre Operations (QCF)

Edexcel Level 3 NVQ Diploma in Contact Centre Operations (QCF)

Edexcel Level 4 NVQ Diploma in Contact Centre Operations (QCF)

References to third party material made in this specification are made in good faith. We do not endorse, approve or accept responsibility for the content of materials, which may be subject to change, or any opinions expressed therein. (Material may include textbooks, journals, magazines and other publications and websites.)

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Summary of specification Issue 3 changes

Summary of changes made between previous issue and this current issue	Page number
Specification updated to reflect the following qualifications being withdrawn: Edexcel Level 1 NVQ Award in Contact Centre Operations (QCF) 600/1570/6 Edexcel Level 4 NVQ Diploma in Contact Centre Operations (QCF) 600/1638/3	
All references to QCF have been removed throughout the specification (excluding documents from other organisations eg Sector Skills assessment guidance in an Annexe)	
Definition of TQT added	3
Definition of sizes of qualifications aligned to TQT	4
TQT value added	6, 8, 10, 14, 17
QCF references removed from unit titles and unit levels in all units	26-486
Guided learning definition updated	23

Earlier issues show previous changes.

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

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Qualification titles covered by this specification

This specification gives you the information you need to offer the Pearson Edexcel Level 1 NVQ Certificate in Contact Centre Operations, the Pearson Edexcel Level 2 NVQ Certificate in Contact Centre Operations and the Pearson Edexcel Level 3 NVQ Diploma in Contact Centre Operations:

Qualification title	Qualification Number (QN)	Accreditation Start date
Pearson Edexcel Level 1 NVQ Certificate in Contact Centre Operations	600/1225/0	01.04.2011
Pearson Edexcel Level 2 NVQ Certificate in Contact Centre Operations	600/1635/8	01.04.2011
Pearson Edexcel Level 3 NVQ Diploma in Contact Centre Operations	600/1226/2	01.04.2011

Qualifications eligible and funded for post-16-year-olds can be found on the funding Hub. The Skills Funding Agency also publishes a funding catalogue that lists the qualifications available for 19+ funding. You should use the Qualification Number (QN), when you wish to seek public funding for your learners. Each unit within a qualification will also have a unique unit reference number, which are listed in this specification.

The qualification title and unit reference numbers will appear on the learners' final certification document. Learners need to be made aware of this when they are recruited by the centre and registered with Pearson.

Key features of the Pearson Edexcel Level 1, 2, and 3 NVQs in Contact Centre Operations

These qualifications:

- are nationally recognised
- are based on the Contact Centre National Occupational Standards (NOS). The NOS, strategy and qualification structures are owned by the Council for Administration (CfA).

The Pearson Edexcel Level 2 NVQ Certificate in Contact Centre Operations, and Pearson Edexcel Level 3 NVQ Diploma in Contact Centre Operations have been approved as components for the Contact Centre Intermediate Apprenticeship/Advanced Apprenticeship/Higher Apprenticeship frameworks, respectively.

What is the purpose of these qualifications?

These qualifications are designed to provide:

- a framework of education and training for those in the contact centre industry with a responsibility to provide customer care and support through call handling activities
- opportunities for call handlers in the contact centre industry to achieve a nationally recognised vocationally specific qualification
- opportunities for full-time learners to gain a nationally recognised vocationally specific qualification to enter employment in the contact centre sector or progress to further vocational qualifications
- the knowledge, understanding and skills learners need to provide effective contact centre customer relations
- opportunities for learners to focus on the development of functional skills
- opportunities for learners to develop a range of skills and techniques, personal qualities and attitudes essential for successful performance in working life.

This range of Contact Centre Operations qualifications maps to the 2011 CfA (www.cfa.uk.com) National Occupational Standards for Contact Centre Operations.

Total Qualification Time (TQT)

For all regulated qualifications, Pearson specifies a total number of hours that it is estimated 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 will include private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

TQT is assigned after consultation with employers and training providers delivering the qualifications.

NVQ/Competence qualifications are generally available in the following sizes:

- Award – a qualification with a TQT value of 120 or less
- Certificate – a qualification with a TQT value in the range of 121–369
- Diploma – a qualification with a TQT value of 370 or more

Who are these qualifications for?

These qualifications are for all learners who are capable of reaching the required standards.

Pearson's policy is that the qualifications should:

- be free from any barriers that restrict access and progression
- ensure equality of opportunity for all wishing to access the qualification(s).

Centres should be aware that for the Level 1 NVQ Certificate in Contact Centre Operations the learner will be required to meet the demands of a mandatory level 2 unit. Centres are advised to consider the support and guidance of their learners to meet the demands of level 2 during the delivery and assessment of this unit.

What are the benefits of these qualifications to the learner and employer?

These qualifications are work-based qualifications, which allow learners to develop the knowledge, understanding and skills essential for working in a contact centre environment. These qualifications require individuals to demonstrate competence against National Occupational Standards (NOS) which are based on the needs of the contact centre sector as defined by the Sector Skills Council. As such they contribute to the development of skilled labour in the sector. The Pearson Edexcel Level 2 NVQ Certificate and the Pearson Edexcel Level 3 NVQ Diploma contribute towards the competence element of Apprenticeships.

What are the potential job roles for those working towards these qualifications?

- Customer service agent
- Telesales agent
- Service delivery manager
- Trainer
- Supervisor
- Operations manager
- Site manager

What progression opportunities are available to learners who achieve these qualifications?

Learners can progress within the suite of Contact Centre Operations qualifications and to Pearson specialist and competence qualifications in related areas such as customer service and telesales.

What is the qualification structure for the Pearson Edexcel Level 1 NVQ Certificate in Contact Centre Operations?

Individual units can be found in the *Units* section.

The minimum credit value for this qualification is 21 (TQT 210 hours) of which at least 11 credits must be at Level 1. GLH: 67.

To achieve the Pearson Edexcel Level 1 NVQ Certificate in Contact Centre Operations the learner must achieve:

- both mandatory units from Group A (six credits)
- a minimum of six credits from Group B
- the remaining nine credits from any units from Group B, Group C and the Restricted Optional ICT Group
- no more than two units may be taken from the Restricted Optional ICT Group.

Group A – Mandatory units. Learners must achieve six credits from this group.

Unit reference	Unit title	Level	Credit value
T/503/0342	Improve Personal Effectiveness at Work in a Contact Centre	2	4
D/503/0352	Comply With Health and Safety Procedures in a Contact Centre	1	2

Group B – Optional units. Learners must achieve a minimum of six credits from this group.

Unit reference	Unit title	Level	Credit value
F/503/0361	Use Specific Features of Contact Centre Systems and Technology	1	3
F/503/0392	Contribute to Customer Service in a Contact Centre	1	3
Y/503/0382	Contribute to Sales Activities in a Contact Centre	1	3
D/503/0402	Communicate Information to Customers Through a Contact Centre	1	4
J/503/0412	Work with Others to Support Customers in a Contact Centre	1	3

Group C – Optional units. The remaining credits may be achieved from this group and the Restricted Optional ICT Group			
Unit reference	Unit title	Level	Credit value
A/502/4395	Bespoke Software	1	2
J/502/8577	Selling by Telephone (In-Bound)	2	4
J/502/8580	Selling by Telephone (Out-Bound)	2	4
R/601/1209	Maintain a Positive and Customer-Friendly Attitude	1	5
F/601/1609	Communicate Using Customer Service Language	1	4
M/601/1508	Recognise and Deal with Customer Queries, Requests and Problems	1	5
T/601/1509	Take Details of Customer Service Problems	1	4
R/601/1548	Develop Your Own Customer Service Skills Through Self-Study	2	6

Group ICT – Restricted Optional ICT Group units. No more than two units may be achieved from this group.			
Unit reference	Unit title	Level	Credit value
Y/502/4291	IT Communication Fundamentals	1	2
T/502/4296	Using the Internet	1	3
J/502/4299	Using Email	1	2
A/502/4378	Using Collaborative Technologies	1	3

What is the qualification structure for the Pearson Edexcel Level 2 NVQ Certificate in Contact Centre Operations?

Individual units can be found in the *Units* section. The minimum credit value for this qualification is 28 (TQT 280 hours) of which at least 15 credits must be at Level 2. GLH: 93.

To achieve the Pearson Edexcel Level 2 NVQ Certificate in Contact Centre Operations the learner must achieve:

- both mandatory units from Group A (6 credits)
- a minimum of 12 credits from Group B
- a minimum of 10 credits from any remaining units from Group B and/or Group C (consisting sub groups C1, C2 and C3)
- no more than **two** IT units may be taken from C2
- no more than one unit may be taken from C3.

Group A – Mandatory units. Learners must achieve six credits from this group.			
Unit reference	Unit title	Level	Credit value
T/503/0342	Improve Personal Effectiveness at Work in a Contact Centre	2	4
D/503/0352	Comply with Health and Safety Procedures in a Contact Centre	1	2
Group B – Learners must achieve a minimum of 12 credits from this group. A maximum of 10 further credits may also be achieved from this group.			
Unit reference	Unit title	Level	Credit value
J/503/0362	Use Systems and Technology During Customer Contact in a Contact Centre	2	4
K/503/0385	Deliver Customer Service Through a Contact Centre	2	5
L/503/0394	Carry Out Direct Sales Activities in a Contact Centre	2	5
H/503/0403	Communicate Information to Customers in Different but Familiar Contexts Through a Contact Centre	2	4
L/503/0413	Provide Support Through a Contact Centre for Specified Products and/or Services	2	4
K/503/0421	Deal with Incidents Through a Contact Centre	2	7
L/503/0426	Support Customers and Colleagues when Providing Contact Centre Services	3	5

Unit reference	Unit title	Level	Credit value
T/503/0342	Improve Personal Effectiveness at Work in a Contact Centre	2	4
D/503/0352	Comply with Health and Safety Procedures in a Contact Centre	1	2

Group B – Learners must achieve a minimum of 12 credits from this group. A maximum of 10 further credits may also be achieved from this group.			
Unit reference	Unit title	Level	Credit value
J/503/0362	Use Systems and Technology During Customer Contact in a Contact Centre	2	4
K/503/0385	Deliver Customer Service Through a Contact Centre	2	5
L/503/0394	Carry Out Direct Sales Activities in a Contact Centre	2	5
H/503/0403	Communicate Information to Customers in Different but Familiar Contexts Through a Contact Centre	2	4
L/503/0413	Provide Support Through a Contact Centre for Specified Products and/or Services	2	4
K/503/0421	Deal with Incidents Through a Contact Centre	2	7
L/503/0426	Support Customers and Colleagues when Providing Contact Centre Services	3	5

Unit reference	Unit title	Level	Credit value
J/503/0362	Use Systems and Technology During Customer Contact in a Contact Centre	2	4
K/503/0385	Deliver Customer Service Through a Contact Centre	2	5
L/503/0394	Carry Out Direct Sales Activities in a Contact Centre	2	5
H/503/0403	Communicate Information to Customers in Different but Familiar Contexts Through a Contact Centre	2	4
L/503/0413	Provide Support Through a Contact Centre for Specified Products and/or Services	2	4
K/503/0421	Deal with Incidents Through a Contact Centre	2	7
L/503/0426	Support Customers and Colleagues when Providing Contact Centre Services	3	5

Group C – A maximum of 10 credits may be achieved from this group.			
Sub-group C1 – a maximum of 10 credits may be achieved from this sub-group.			
Unit reference	Unit title	Level	Credit value
L/502/4627	Word Processing Software	1	3
M/502/8606	Handling Objections and Closing Sales	2	3
F/502/8599	Time Planning in Sales	2	2
J/502/8577	Selling by Telephone (Inbound)	2	4
J/502/8580	Selling by Telephone (Outbound)	2	4
D/502/8584	Inputting and Accessing Sales or Marketing Data in Information Systems	2	2
H/600/9660	Develop Working Relationships with Colleagues	2	3
D/601/0936	Promote Additional Services or Products to Customers	2	6
F/601/1223	Deal with Incoming Telephone Calls from Customers	2	5
Y/601/1227	Maintain Customer Service Through Effective Hand Over	2	4
M/601/1511	Resolve Customer Service Problems	2	6
H/601/1215	Process Information About Customers	2	5
T/601/1512	Deliver Customer Service to Difficult Customers	2	6
M/601/1542	Buddy a Colleague to Develop Their Customer Service Skills	2	5
R/601/1548	Develop Your Own Customer Service Skills Through Self-Study	2	6
L/601/0939	Give Customers a Positive Impression of Yourself and Your Organisation	2	5
H/601/1540	Support Customers Using Online Customer Services	2	5
L/601/1614	Follow the Rules to Deliver Customer Service	2	4
D/601/1522	Process Customer Service Complaints	3	6
D/601/1533	Work with Others to Improve Customer Service	3	8

Sub-group C2 – Restricted Optional ICT units. A maximum of two units may be achieved from groups C2 IT1, C2 IT2, C2 IT3 and C2 IT4.			
Unit reference	Unit title	Level	Credit value
Group C2 IT1	No more than one unit may be achieved from this group.		
T/502/4296	Using the Internet	1	3
A/502/4297	Using the Internet	2	4
Group C2 IT2	No more than one unit may be achieved from this group.		
Y/502/4291	IT Communication Fundamentals	1	2
D/502/4292	IT Communication Fundamentals	2	4
Group C2 IT3	No more than one unit may be achieved from this group.		
J/502/4299	Using Email	1	2
M/502/4300	Using Email	2	3
Group C2 IT4	No more than one unit may be achieved from this group.		
A/502/4378	Using Collaborative Technologies	1	3
F/502/4379	Using Collaborative Technologies	2	4
Sub-group C3 – Restricted Optional units. No more than one unit may be achieved from this group.			
Unit reference	Unit title	Level	Credit value
L/601/1225	Deal with Customers Using Bespoke Software	2	5
F/502/4396	Bespoke Software	2	3

What is the qualification structure for the Pearson Edexcel Level 3 NVQ Diploma in Contact Centre Operations?

Individual units can be found in the *Units* section.

The minimum credit value for this qualification is 42 (TQT 420 hours) of which at least 23 credits must be at level 3. GLH: 86.

To achieve the Pearson Edexcel Level 3 NVQ Diploma in Contact Centre Operations the learner must achieve:

- both mandatory units from Group A (6 credits)
- a minimum of 21 credits from Group B
- a further 15 credits to be achieved from Group B and/or Group C

The learner may take **either** J/502/4397 or L/601/1225 but not both, from Group C.

Group A – Mandatory units. Learners must achieve six credits from this group.			
Unit reference	Unit title	Level	Credit value
D/503/0352	Comply with Health and Safety Procedures in a Contact Centre	1	2
Y/503/0348	Develop Personal and Organisational Effectiveness in a Contact Centre	3	4

Group B – Learners must achieve a minimum of 21 credits from this group. Up to a maximum of 15 further credits may also be achieved from this group.			
Unit reference	Unit title	Level	Credit value
M/503/0355	Monitor Health and Safety Procedures in a Contact Centre	3	5
R/503/0364	Support Team Use of Contact Centre Systems and Technology	3	6
T/503/0387	Supervise Customer Service Activities in a Contact Centre Team	3	4
A/503/0388	Manage Customer Service Delivery in a Contact Centre	4	6
L/503/0394	Carry Out Direct Sales Activities in a Contact Centre	2	5

Unit reference	Unit title	Level	Credit value
D/503/0397	Lead Direct Sales Activities in a Contact Centre Team	3	4
H/503/0398	Manage Direct Sales Activities in a Contact Centre	4	6
K/503/0404	Communicate Information to Customers Through a Contact Centre	3	4
T/503/0406	Coordinate Customer Communication Processes in a Contact Centre	4	6
A/503/0407	Contribute to Performance Management in a Contact Centre	3	4
J/503/0426	Support Customers and Colleagues when Providing Contact Centre Services	3	5
L/503/0427	Maintain Customer Support Operations in a Contact Centre	4	5
L/503/0430	Contribute to Resource Plan Development in Contact Centre Operations	3	7
K/503/0421	Deal with Incidents Through a Contact Centre	2	7
K/503/0418	Manage Incidents Referred to a Contact Centre	3	6

Group C – Optional units. Learners may achieve a maximum of 15 credits from this group. Learners may achieve either J/502/4397 or L/601/1225 but not both.

Unit reference	Unit title	Level	Credit value
A/502/4297	Using the Internet	2	4
D/502/4292	IT Communication Fundamentals	2	2
M/502/4300	Using Email	2	3
F/502/4379	Using Collaborative Technologies	2	4
M/502/8606	Handling Objections And Closing Sales	2	3
T/502/8641	Leading a Sales or Marketing Team	3	4
F/502/8612	Negotiating, Handling Objections and Closing Sales	3	4
A/502/8639	Contributing to the Development and Launch of New Products and/or Services	3	4
M/600/9600	Set Objectives and Provide Support for Team Members	3	5
L/600/9586	Manage Own Professional Development within an Organisation	3	4
L/600/9636	Support Team Members in Identifying, Developing and Implementing New Ideas	3	4

Unit reference	Unit title	Level	Credit value
Y/600/9669	Plan and Allocate and Monitor Work of a Team	3	5
D/600/9804	Manage Customer Service in Own Area of Responsibility	3	4
M/600/9628	Manage Or Support Equality Of Opportunity, Diversity And Inclusion in Own Area Of Responsibility	3	4
H/600/9660	Develop Working Relationships with Colleagues	2	3
R/600/9685	Manage Conflict in a Team	3	3
Y/600/9686	Lead and Manage Meetings	3	4
H/601/1540	Support Customers Using Online Customer Services	2	5
M/601/1542	Buddy a Colleague to Develop their Customer Service Skills	2	5
R/601/1548	Develop Your Own Customer Service Skills Through Self-Study	2	6
Y/601/1227	Maintain Customer Service Through Effective Handover	2	4
Y/601/1230	Organise the Delivery of Reliable Customer Service	3	6
H/601/1568	Lead a Team to Improve Customer Service	3	7
H/601/1571	Gather, Analyse and Interpret Customer Feedback	3	10
T/601/1574	Monitor the Quality of Customer Service Transactions	3	7
K/601/1233	Build a Customer Service Knowledge Set	3	7
D/601/1533	Work with Others to Improve Customer Service	3	8
D/601/1522	Process Customer Service Complaints	3	6
K/601/1424	Handle Referred Customer Complaints	4	10
R/600/9685	Champion Customer Service	4	10
Learners may achieve either J/502/4397 or L/601/1225 but not both.			
J/502/4397	Bespoke Software	3	4
L/601/1225	Deal with Customers Using Bespoke Software	2	5

How are the qualifications graded and assessed?

The overall grade for each qualification is a 'pass'. The learner must achieve all the required units within the specified qualification structure.

To pass a unit the learner must:

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

The qualifications are designed to be assessed:

- in the workplace or
- in conditions resembling the workplace, as specified in the assessment requirements/strategy for the sector, or
- as part of a training programme.

Assessment strategy

The assessment strategy for these qualifications has been included in *Annexe C*. They have been developed by the Council for Administration in partnership with employers, training providers, awarding organisations and the regulatory authorities. The assessment strategy includes details on:

- criteria for defining realistic working environments
- roles and occupational competence of assessors, expert witnesses, internal verifiers and standards verifiers
- quality control of assessment
- evidence requirements.

Evidence of competence may come from:

- **current practice** where evidence is generated from a current job role
- a **programme of development** where evidence comes from assessment opportunities built into a learning/training programme whether at or away from the workplace
- the **Recognition of Prior Learning (RPL)** where a learner can demonstrate that they can meet the assessment criteria within a unit through knowledge, understanding or skills they already possess without undertaking a course of learning. They must submit sufficient, reliable and valid evidence for internal and standards verification purposes. RPL is acceptable for accrediting a unit, several units or a whole qualification
- a **combination** of these.

It is important that the evidence is:

Valid	relevant to the standards for which competence is claimed
Authentic	produced by the learner
Current	sufficiently recent to create confidence that the same skill, understanding or knowledge persist at the time of the claim
Reliable	indicates that the learner can consistently perform at this level
Sufficient	fully meets the requirements of the standards.

Types of evidence (to be read in conjunction with the assessment strategy in Annexe D)

To successfully achieve a unit the learner must gather evidence which shows that they have met the required standard in the assessment criteria. Evidence can take a variety of different forms including the examples below. Centres should refer to the assessment strategy for information about which of the following are permissible:

- 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)
- outcomes from simulation, where permitted by the assessment strategy (S)
- professional discussion (PD)
- assignment, project/case studies (A)
- authentic statements/witness testimony (WT)
- expert witness testimony (EPW)
- evidence of Recognition of Prior Learning (RPL).

The abbreviations may be used for cross-referencing purposes.

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, therefore, not necessary for learners to have each assessment criterion assessed separately. Learners should be encouraged to reference the assessment criteria to which the evidence relates.

Evidence must be made available to the assessor, internal verifier and Pearson standards verifier. A range of recording documents is available on our website, qualifications.pearson.com. Alternatively, centres may develop their own.

Centre recognition and approval

Centre recognition

Centres that have not previously offered Pearson qualifications need to apply for and be granted centre recognition as part of the process for approval to offer individual qualifications. New centres must complete both a centre recognition approval application and a qualification approval application.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by the new qualification and the conditions for automatic approval are met. Centres already holding Pearson approval are able to gain qualification approval for a different level or different sector via Edexcel online.

Approvals agreement

All centres are required to enter into an approvals agreement which is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and any linked codes or regulations. Pearson will act to protect the integrity of the awarding of qualifications, if centres do not comply with the agreement. This could result in the suspension of certification or withdrawal of approval.

Quality assurance

Detailed information on Pearson's quality assurance processes is given in *Annexe A*.

What resources are required?

Each qualification is designed to support learners working in the contact centre sector. Physical resources need to support the delivery of the qualifications and the assessment of the learning outcomes and must be of industry standard. Centres must meet any specific resource requirements outlined in *Annexe C: Assessment strategy*. Staff assessing the learner must meet the requirements within the overarching assessment strategy for the sector.

Unit format

Each unit in this specification contains the following sections.

Unit title:					This is the formal title of the unit that will appear on the learner's certificate.
Unit code:					This is the unit owner's reference number for the specified unit.
Unit reference number:					This code is a unique reference number for the unit.
level:					All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors by Ofqual, the qualifications regulator.
Credit value:					All units have a credit value. The minimum credit value is one, and credits can only be awarded in whole numbers. Learners will be awarded credits when they achieve the unit.
Guided learning hours:					Guided Learning Hours (GLH) is the number of hours that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.
Unit summary:					This provides a summary of the purpose of the unit.
Assessment requirements/evidence requirements:					The assessment/evidence requirements are determined by the SSC. Learners must provide evidence for each of the requirements stated in this section.
Assessment methodology:					This provides a summary of the assessment methodology to be used for the unit.
Learning outcomes:	Assessment criteria:	Evidence type:	Portfolio reference:	Date:	
			The learner should use this box to indicate where the evidence can be obtained eg portfolio page number.	The learner should give the date when the evidence has been provided.	
Learning outcomes state exactly what a learner should know, understand or be able to do as a result of completing a unit.		The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or a set of learning outcomes, has been achieved.		Learners must reference the type of evidence they have and where it is available for quality assurance purposes. The learner can enter the relevant key and a reference. Alternatively, the learner and/or centre can devise their own referencing system.	

Units

Unit 1: Improve Personal Effectiveness at Work in a Contact Centre

Unit reference number: T/503/0342

Level: 2

Credit value: 4

Guided learning hours: 15

Unit summary

This unit concerns being able to assess personal effectiveness in a contact centre, carry out development activities to improve personal effectiveness, work with others in a contact centre team to improve personal performance and understand how to improve personal effectiveness in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to assess personal effectiveness in a contact centre	1.1 Identify strengths and areas for development in skills and knowledge against agreed criteria 1.2 Agree learning actions that address priority learning and personal development needs			
2	Be able to carry out development activities to improve personal effectiveness in a contact centre	2.1 Participate in programme of learning activities that supports personal development needs 2.2 Use feedback from participation in the agreed development activities to improve personal performance			
3	Be able to work with others in a contact centre team to improve personal performance	3.1 Identify how everyday work in a team leads to learning and personal development 3.2 Participate in team tasks that provide on-the-job learning opportunities 3.3 Use feedback on personal performance to plan further learning steps			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Understand how to improve personal effectiveness in a contact centre	4.1 Describe the organisational procedures and guidelines for contact centre tasks defined by their job role			
		4.2 Describe the range of products and/or services offered or supported by the contact centre			
		4.3 Describe the impact of legislation and/or regulations on their role within the contact centre			
		4.4 Explain the importance of using development activities that are relevant to identified business needs			
		4.5 Explain different sources of feedback to the personal development process			
		4.6 Explain the importance of feedback to the personal development process			
		4.7 Explain the importance of involving a person in authority in making a personal development plan			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 2: Comply with Health and Safety Procedures in a Contact Centre

Unit reference number: D/503/0352

Level: 1

Credit value: 2

Guided learning hours: 9

Unit summary

This unit concerns being able to comply with organisational health and safety procedures in a contact centre, minimise health and safety risks relating to the job role and understand the principles of health and safety in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to comply with organisational health and safety procedures in a contact centre	1.1 Identify the health and safety procedures relevant to the job role 1.2 Follow organisational health and safety procedures and techniques at all times 1.3 Follow the organisational and the manufacturer's instructions for the use of equipment and tools			
2	Be able to minimise health and safety risks relating to the job role in a contact centre	2.1 Identify the health and safety risks relevant to the job role 2.2 List the job role duties and responsibilities for minimising health and safety risks 2.3 Keep the work area clean and tidy in accordance with organisational requirements 2.4 Identify the actions to be taken if health and safety risks are not being minimised			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand the principles of health and safety in a contact centre	3.1	State how health and safety procedures affect their job role		
		3.2	Explain the purpose and use of safety-related equipment		
		3.3	Explain how to lift and handle heavy objects safely		
		3.4	Describe the health and safety hazards relevant to the job role		
		3.5	Describe common health and safety standards in the workplace including excessive noise, prolonged use of display screens and hazardous substances		
		3.6	Explain why it is important to keep the work area clean and tidy		
		3.7	State the difference between hazard and risk in the work area		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 3: Develop Personal and Organisational Effectiveness in a Contact Centre

Unit reference number: Y/503/0348

Level: 3

Credit value: 4

Guided learning hours: 10

Unit summary

This unit concerns being able to improve performance in a contact centre, obtain feedback on work performance, use feedback to improve personal and organisational effectiveness and understand the principles underpinning personal and organisational effectiveness in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to improve performance in a contact centre	<p>1.1 Assess strengths and areas for personal development in the skills and knowledge needed to fulfil job role requirements</p> <p>1.2 Prioritise areas for personal development against job role requirements</p> <p>1.3 Identify development activities that are appropriate for improving identified areas for development</p> <p>1.4 Use learning from development activities in the job role within the agreed timescale</p>			
2	Be able to obtain feedback on work performance in a contact centre	<p>2.1 Identify sources of feedback that will help develop personal and organisational effectiveness</p> <p>2.2 Obtain feedback from different sources that are relevant to their job role</p>			
3	Be able to use feedback to improve personal and organisational effectiveness in a contact centre	<p>3.1 Agree with a person in authority the actions to be undertaken as a result of an analysis of the feedback</p> <p>3.2 Agree a development plan with a person in authority which includes agreed objectives</p> <p>3.3 Implement agreed actions in accordance with the development plan</p> <p>3.4 Evaluate the effectiveness of the development plan against agreed objectives</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Understand the principles underpinning personal and organisational effectiveness in a contact centre	4.1 Explain the products and/or services offered or supported by the contact centre			
		4.2 Explain the requirements of contact centre operational procedures and guidelines			
		4.3 Explain the regulation and legislation that have an impact on contact centre operations			
		4.4 Explain the importance of taking responsibility for personal development			
		4.5 Describe self-assessment techniques for measuring personal strengths and weaknesses			
		4.6 Explain the importance of prioritising actions to develop personal and organisational effectiveness			
		4.7 Explain methods for analysing feedback about personal and organisational effectiveness			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 4: Use Specific Features of Contact Centre Systems and Technology

Unit reference number: F/503/0361

Level: 1

Credit value: 4

Guided learning hours: 12

Unit summary

This unit concerns being able to use contact centre systems and technology to carry out customer contact tasks and understand contact centre systems and technology.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to use contact centre systems and technology to carry out customer contact tasks	1.1 Log into the technology system that is appropriate for dealing with customer contacts			
		1.2 Follow defined pathways through the system to complete customer contact tasks			
		1.3 Use features of the technology contact handling system to control customer contacts			
		1.4 Locate information on the system needed to complete a customer contact			
		1.5 Identify to whom to refer when the customer contact cannot be completed			
		1.6 Input information into the system in accordance with organisational procedures			
		1.7 Validate the customer's identity from information given and information held on the system			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Understand contact centre systems and technology	2.1	State the organisational procedures and guidelines for handling customer contacts		
		2.2	List the products and/or services offered or supported by the contact centre		
		2.3	List the regulation and/or legislation relevant to the contact centre's work with customers		
		2.4	State to whom to pass contacts when they are outside the limits of their authority or the customer contact is too difficult to handle		
		2.5	State the procedures for logging onto the technology systems		
		2.6	State how to respond to prompts from the system indicating the pathway to be followed		
		2.7	State how to use systems and technology to handle customer contacts		
		2.8	Identify the categories of customer contacts that they are authorised to handle		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 5: Contribute to Customer Service in a Contact Centre

Unit reference number: Y/503/0382

Level: 1

Credit value: 3

Guided learning hours: 5

Unit summary

This unit concerns being able to meet customer expectations in a contact centre, meet organisational and regulatory requirements during customer contact, gather specified customer satisfaction information in a contact centre and understand the purpose of customer service in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to meet customer expectations in a contact centre	1.1 Greet customers in accordance with organisational guidelines 1.2 Provide requested information about products and/or services 1.3 Check the customer's understanding of the information provided 1.4 Close the customer contact in accordance with organisational guidelines			
2	Be able to meet organisational and regulatory requirements during customer contact	2.1 Deal with customers within organisational and regulatory restrictions 2.2 Explain to customers the limitations of the information that can be provided 2.3 Meet customer expectations of respect and politeness when delivering service within defined limits			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to gather specified customer satisfaction information in a contact centre	3.1 Identify the customer satisfaction questions that should be asked			
		3.2 Ask customers specified questions about their level of satisfaction with service through the contact centre			
		3.3 Record responses to customer satisfaction in accordance with organisational guidelines			
4	Understand the purpose of customer service in a contact centre	4.1 List the products and/or services offered or supported by the contact centre			
		4.2 Explain how customer satisfaction can be influenced by behaviour toward the customer			
		4.3 State the organisational requirements and regulation and/or legislation that place limits on the customer service that can be provided			
		4.4 State to whom to refer dissatisfied customers			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 6: Contribute to Sales Activities in a Contact Centre

Unit reference number: F/503/0392

Level: 1

Credit value: 3

Guided learning hours: 6

Unit summary

This unit concerns being able to gather and use specified sales information in a contact centre, make direct sales to customers and understand sales activities in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to gather and use specified sales information in a contact centre	1.1 Gather the specified information about customers, products and/or services in accordance with organisational procedures			
		1.2 Provide information to customers about products and/or services in accordance with organisational procedures			
		1.3 Collect from customers information that supports potential sales in accordance with organisational procedures			
		1.4 Check with customers the accuracy of the information provided			
		1.5 Keep records of customers in accordance with organisational procedures			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Be able to make direct sales to customers through a contact centre	2.1 Identify customers in accordance with organisational procedures			
		2.2 Establish customers' needs for potential sales of products and/or services within their level of authority			
		2.3 Check with customers the accuracy of the order			
		2.4 Refer customers to an authorised colleague when sales requests are beyond their level of authority			
		2.5 Complete the authorisation or payment in accordance with organisational procedures			
3	Understand sales activities in a contact centre	3.1 List the products and/or services offered or supported by the contact centre			
		3.2 List the regulations and/or legislation that has an impact on dealing with customers			
		3.3 State the organisational procedures for processing sales and payments and/or establishing order authority with customers			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 7: **Communicate Information to Customers Through a Contact Centre**

Unit reference number: D/503/0402

Level: 1

Credit value: 4

Guided learning hours: 10

Unit summary

This unit concerns being able to talk to customers on a familiar subject in a contact centre, communicate in writing on a familiar subject and understand how to communicate with customers in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to talk to customers on a familiar subject in a contact centre	1.1 Greet customers in accordance with organisational guidelines 1.2 Describe the products and/or services to customers in accordance with organisational guidelines 1.3 Speak to customers in a way that makes them feel confident about what is being said 1.4 Use positive language when describing products and/or services			
2	Be able to communicate in writing on a familiar subject in a contact centre	2.1 Complete written communications to customers in accordance with organisational guidelines 2.2 Present written communications with customers in formats that comply with organisational guidelines 2.3 Confirm that written communications are grammatically correct; spelled correctly and in house style before sending			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand how to communicate with customers in a contact centre	3.1 State the products and/or services offered or supported by the contact centre			
		3.2 List the organisational requirements and/or regulations about what can and cannot be expressed to customers verbally and/or in writing			
		3.3 State what information is best given to customers verbally and what is best given in writing			
		3.4 Explain the difference between positive and negative language when communicating with customers verbally and/or in writing			
		3.5 Explain how to demonstrate "active listening"			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 8: Work with Others to Support Customers in a Contact Centre

Unit reference number: J/503/0412

Level: 1

Credit value: 3

Guided learning hours: 10

Unit summary

This unit concerns being able to establish and validate customers' identities in a contact centre, communicate information about specified products and/or services, hand over customer contacts to others and understand support for customers in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to establish and validate customers' identities in a contact centre	1.1 Use agreed greetings and openings for customer conversations 1.2 Link customers' identity with organisational records 1.3 Confirm customers' identity and authority in accordance with organisational procedures 1.4 Inform customers of what can or cannot be handled if their identity cannot be confirmed			
2	Be able to communicate information about specified products and/or services in a contact centre	2.1 Establish the products and/or services about which customers need information 2.2 Give customers a summarised introduction to requested products and/or services 2.3 Deal with customers within the agreed limits of what can be handled 2.4 Conclude a customer contact in accordance with organisational procedures			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to hand over customer contacts to others in a contact centre	3.1 Refer customers elsewhere when they require information outside their limits of authority or knowledge			
		3.2 Explain to customers why and how they will be passed to someone else in accordance with organisational procedures			
		3.3 Provide as much information as possible about the customer contact prior to recording the contact			
4	Understand how support for customers in a contact centre is provided	4.1 List the products and/or services offered or supported by the contact centre			
		4.2 List the regulations and/or legislation that has an impact on customers			
		4.3 Explain how to use communication equipment for dealing with customer contacts			
		4.4 State how and when to escalate a customer contact			
		4.5 Describe the listening and questioning techniques to establish the information needed by customers			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 9: Bespoke Software

Unit reference number: A/502/4395

Level: 1

Credit value: 2

Guided learning hours: 15

Unit summary

This is the ability to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively.

This unit is about the skills and knowledge needed by an IT user to use basic bespoke software tools and techniques appropriately for straightforward or routine information. Any aspect that is unfamiliar will require support and advice from others.

Bespoke software tools and techniques will be defined as 'basic' because:

- the software tools and functions involved will be pre-defined or commonly used;
- the range of inputting, manipulation and outputting techniques are straightforward or routine; and
- the data type and structure will be predetermined or familiar.

Assessment requirements/evidence requirements

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Input, organise and combine information using bespoke software	1.1 Input relevant information accurately into existing templates and/or files so that it is ready for processing			
		1.2 Organise and combine information of different forms or from different sources			
		1.3 Follow local and/or legal guidelines for the storage and use of data where available			
		1.4 Respond appropriately to data entry error messages			
2	Use tools and techniques to edit, process, format and present information	2.1 Use appropriate tools and techniques to edit, process and format information			
		2.2 Check information meets needs, using IT tools and making corrections as appropriate			
		2.3 Use appropriate presentation methods and accepted layouts			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 10: Using the Internet

Unit reference number: T/502/4296

Level: 1

Credit value: 3

Guided learning hours: 20

Unit summary

This unit is about the skills and knowledge needed by the IT User to understand and use a connection method and basic Internet software tools and techniques to search for and exchange information for straightforward or routine activities. Any aspect that is unfamiliar will require support and advice from others.

Internet tools and techniques will be defined as 'basic' because:

- the software tools and functions will be pre-determined or commonly used; and
- the range of techniques used for searching and exchanging information will be familiar or commonly undertaken.

An activity will typically be 'straightforward or routine' because:

- the task or context will be familiar and involve few factors (for example, time available, audience needs, content, structure); and
- the input and output of information will be predetermined by the person supervising the task.

Assessment requirements/evidence requirements

Evidence of achievement can be derived from a variety of sources.

Learners who use their IT skills directly in their day-to-day work can prove their competence whilst doing so. Alternatively learners can use scenarios and knowledge tests – or a mixture of both – to demonstrate competence.

Assessment methodology

All ITQ units may be assessed using any method, or combination of methods, which clearly demonstrates that the learning outcomes and assessment criteria have been met.

Whilst assessors are required to have a sound understanding of the unit requirements and be able to give appropriate feedback to learners, they do not have to be A1 qualified. However, ideally every assessor should have ITQ Level 3 or equivalent in order to be able to adequately assess at that level and below.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Connect to the internet	1.1 Identify different types of connection methods that can be used to access the Internet 1.2 Access the Internet or intranet			
2 Use browser software to navigate web pages	2.1 Use browser tools to navigate web pages 2.2 Identify when to change browser settings to aid navigation 2.3 Adjust browser settings to meet needs 2.4 Use browser help facilities			
3 Use browser tools to search for information from the internet	3.1 Select and use appropriate search techniques to locate information 3.2 Outline how information meets requirements 3.3 Use references to make it easier to find information another time 3.4 Download and save different types of information from the Internet			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Use browser software to communicate information online	4.1	Select and use tools and techniques to communicate information online		
		4.2	Use browser tools to share information sources with others		
		4.3	Submit information online using forms or interactive sites		
		4.4	Identify opportunities to post or publish material to websites		
5	Follow and understand the need for safety and security practices when working online	5.1	Identify the threats to user safety when working online		
		5.2	Outline how to minimise internet security risks		
		5.3	Work responsibly and take appropriate safety and security precautions when working online		
		5.4	Keep personal information secure		
		5.5	Follow relevant laws, guidelines and procedures for the use of the Internet		

Date: _____
 Learner name: _____
 Learner signature: _____ Date: _____
 Assessor signature: _____ Date: _____
 Internal verifier signature: _____ Date: _____
 (if sampled)

Unit 11: IT Communication Fundamentals

Unit reference number: Y/502/4291

Level: 1

Credit value: 2

Guided learning hours: 15

Unit summary

This unit is about the skills and knowledge needed by the IT user to use appropriate IT tools and techniques to find and evaluate information and send and receive messages using IT-based communication systems when undertaking routine and straightforward activities. Any aspect that is unfamiliar will require support and advice from others.

An activity will typically be 'straightforward or routine' because:

- the task or context will be familiar and involve few factors (for example, time available, audience needs, content, structure);
- the input and output of information will be predetermined by the person supervising the task; and
- the techniques used will be familiar or commonly undertaken.

Assessment requirements/evidence requirements

Evidence of achievement can be derived from a variety of sources.

Learners who use their IT skills directly in their day-to-day work can prove their competence whilst doing so. Alternatively learners can use scenarios and knowledge tests – or a mixture of both – to demonstrate competence.

Assessment methodology

All ITQ units may be assessed using any method, or combination of methods, which clearly demonstrates that the learning outcomes and assessment criteria have been met.

Whilst assessors are required to have a sound understanding of the unit requirements and be able to give appropriate feedback to learners, they do not have to be A1 qualified. However, ideally every assessor should have ITQ Level 3 or equivalent in order to be able to adequately assess at that level and below.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Use a variety of sources of information to meet needs	1.1 Use appropriate sources of IT-based and other forms of information to meet needs			
		1.2 Identify different features of information			
		1.3 Recognise copyright constraints on the use of information			
2	Access, search for, select and use Internet-based information and assess its fitness for purpose	2.1 Access, navigate and search internet sources of information purposefully and effectively			
		2.2 Use appropriate search techniques to locate and select relevant information			
		2.3 Outline how the information meets requirements and is fit for purpose			
3	Select and use IT to communicate and exchange information	3.1 Create, access, read and respond appropriately to email and other IT-based communication			
		3.2 Use IT tools to maintain an address book and schedule activities			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 12: Using Email

Unit reference number: J/502/4299

Level: 1

Credit value: 2

Guided learning hours: 15

Unit summary

This is the ability to make the best use of email software to safely and securely send, receive and store messages.

This unit is about the skills and techniques to use a range of basic email software tools to send, receive and store messages for straightforward or routine activities. Any aspect that is unfamiliar will require support and advice from others.

Email tools and techniques will be defined as 'basic' because:

- the software tools and functions will be predetermined or commonly used; and
- the techniques used will be familiar or commonly undertaken.

An activity will typically be 'straightforward or routine' because:

- the task or context will be familiar and involve few factors (for example, time available, audience needs, content, structure); and
- the input and output of information will be predetermined by the person supervising the task.

Assessment requirements/evidence requirements

This unit was developed by eSkills. The following methods are recommended by eSkills for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eSkills UK and the awarding body.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Whilst assessors are required to have a sound understanding of the unit requirements and be able to give appropriate feedback to learners, they do not have to be A1 qualified. However, ideally every assessor should have ITQ Level 3 or equivalent in order to be able to adequately assess at that level and below.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Use email software tools and techniques to compose and send messages	1.1 Use software tools to compose and format email messages 1.2 Attach files to email messages 1.3 Send email messages 1.4 Identify how to stay safe and respect others when using email 1.5 Use an address book to store and retrieve contact information			
2	Manage incoming email effectively	2.1 Follow guidelines and procedures for using email 2.2 Identify when and how to respond to email messages 2.3 Read and respond to email messages appropriately 2.4 Identify what messages to delete and when to do so 2.5 Organise and store email messages 2.6 Respond appropriately to common email problems			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 13: Using Collaborative Technologies

Unit reference number: A/502/4378

Level: 1

Credit value: 3

Guided learning hours: 20

Unit summary

This is the ability to use IT tools and devices for collaborative working and communications, such as web or video conferencing, instant messaging/chat, online phone and video calls, online forums, social networking sites, wikis and other centralised depositories for documents, blogging, RSS and data feeds, bulk SMS or online work management tools.

This unit is about the skills and knowledge to safely use IT tools and devices to work collaboratively by:

- preparing and accessing IT tools and devices;
- playing a responsible and active role in real-time communication; and
- contributing relevant information.

Forbidden combination

This unit must not be taken with *Using Collaborative Technologies (Level 2)* (F/502/4379).

Assessment requirements/evidence requirements

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Whilst assessors are required to have a sound understanding of the unit requirements and be able to give appropriate feedback to learners, they do not have to be A1 qualified. However, ideally every assessor should have ITQ Level 3 or equivalent in order to be able to adequately assess at that level and below.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Stay safe and secure when using collaborative technology	1.1 Follow guidelines for working with collaborative technology			
		1.2 Identify risks in using collaborative technology and why it is important to avoid them			
		1.3 Carry out straightforward checks on others' online identities and different types of information			
		1.4 Identify when and how to report online safety and security issues			
		1.5 Identify what methods are used to promote trust			
2	Set up and access IT tools and devices for collaborative working	2.1 Set up IT tools and devices that will enable you to contribute to collaborative work			
		2.2 Identify the purpose for using collaborative technologies and expected outcomes			
		2.3 Identify which collaborative technology tools and devices to use for different communication media			
		2.4 Identify what terms and conditions apply to using collaborative technologies			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Prepare collaborative technologies for use	3.1 Use given details to access collaborative technologies needed for a collaborative task			
		3.2 Adjust basic settings on collaborative technologies			
		3.3 Change the environment of collaborative technologies			
		3.4 Set up and use a data reader to feed information			
		3.5 Identify what and why permissions are set to allow others to access information			
4	Contribute to tasks using collaborative technologies	4.1 Contribute responsibly and actively to collaborative working			
		4.2 Contribute to producing and archiving the agreed outcome of collaborative working			
		4.3 Identify when there is a problem with collaborative technologies and where to get help			
		4.4 Respond to simple problems with collaborative technologies			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Unit 14: Selling by Telephone (Inbound)

Unit reference number: J/502/8577

Level: 2

Credit value: 4

Guided learning hours: 27

Unit summary

This unit aims to provide the skills necessary for responding to inbound sales calls.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand how to sell by telephone (inbound)	<p>1.1 Describe the advantages and disadvantages of selling by inbound telephone sales calls</p> <p>1.2 Describe when the following techniques can be applied when selling by inbound telephone sales calls: cross-selling, up-selling and selling add-ons</p> <p>1.3 Describe the listening and questioning techniques used for selling during inbound telephone sales calls</p> <p>1.4 Describe the different methods used to sell benefits during inbound telephone sales calls</p>			
2	Understand how to close the sale during inbound telephone sales calls	<p>2.1 Explain how to manage customer behaviour during inbound telephone sales calls</p> <p>2.2 Describe methods for closing sales during inbound telephone sales calls</p> <p>2.3 Explain how to evaluate and measure the success of inbound telephone sales calls</p> <p>2.4 Describe interactive ICT options available to support telephone sales activities</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to prepare for the inbound telephone sales call	3.1 Identify objectives for selling products and/or services by inbound telephone sales calls 3.2 Organise materials for a call in accordance with the sales call plan			
4	Be able to identify customer needs during inbound telephone sales calls	4.1 Greet and respond to callers in accordance with organisational procedures 4.2 Obtain information from customers about their needs 4.3 Assess the potential value of calls and customers 4.4 Identify products and/or services with features and functions that customers need or want 4.5 Identify opportunities for further sales and/or sales of other products and/or services			
5	Be able to present products and/or services to the customer during inbound telephone sales calls	5.1 Explain the benefits and features of products and/or services offered 5.2 Interpret the customer's reaction and decide how to progress the sale			
6	Be able to deal with sales objections during inbound telephone sales calls	6.1 Identify sales objections prior to dealing with the customer 6.2 Clarify objections and identify potential sales opportunities from them 6.3 Deal with customer queries and objections with clear and accurate responses			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		6.4 Resolve customer queries about the product and/or service			
		6.5 Reassure the customer to confirm their objections have been overcome			
		6.6 Develop a positive relationship with the customer and identify and pursue further customer contact			
7	Be able to close the sale during inbound telephone sales calls	7.1 Perform a trial close to establish whether or not further objections exist 7.2 Gain commitment from the customer to close the sale 7.3 Complete the formalities of the sale following organisational procedures 7.4 Provide customer feedback and reaction to products and/or services to appropriate people in own organisation			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 15: Selling by Telephone (Outbound)

Unit reference number: J/502/8580

Level: 2

Credit value: 4

Guided learning hours: 27

Unit summary

This unit aims to provide the skills necessary for conducting outbound sales calls.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand how to sell by telephone (outbound)	<p>1.1 Describe the advantages and disadvantages of selling by outbound telephone sales calls</p> <p>1.2 Describe when the following techniques can be applied when selling by outbound telephone sales calls: cross-selling, up-selling and selling add-ons</p> <p>1.3 Describe the listening and questioning techniques used for selling during outbound telephone sales calls</p> <p>1.4 Describe the different methods used to sell benefits during outbound telephone sales calls</p>			
2	Understand how to close the sale during outbound telephone sales calls	<p>2.1 Explain how to manage customer behaviour during outbound telephone sales calls</p> <p>2.2 Describe methods for closing sales during outbound telephone sales calls</p> <p>2.3 Explain how to evaluate and measure the success of outbound telephone sales calls</p> <p>2.4 Describe interactive ICT options available to support telephone sales activities</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to prepare for the inbound telephone sales call	3.1 Identify objectives for selling products and/or services by outbound telephone sales calls 3.2 Use agreed call lists or leads to plan sales calls 3.3 Organise materials for the call in accordance with the sales call plan			
4	Be able to identify customer needs during outbound telephone sales calls	4.1 Assess the potential value of calls and customers 4.2 Prioritise calls according to likely customer value and probability of closure 4.3 Obtain information from customers about their needs 4.4 Identify products and/or services with features and functions that customers need or want 4.5 Identify opportunities for further sales and/or sales of other products and/or services			
5	Be able to present products and/or services to the customer during outbound telephone sales calls	5.1 Explain the benefits and features of products and or services offered 5.2 Interpret the customer's preferred solution and decide how to progress the sale			
6.	Be able to deal with sales objections during outbound telephone sales calls	6.1 Identify likely sales objections prior to dealing with the customer 6.2 Clarify objections and identify potential sales opportunities from them 6.3 Deal with customer queries and objections with clear and accurate responses			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	6.4 Resolve customer queries about the product and/or service 6.5 Reassure the customer to confirm their objections have been overcome 6.6 Develop a positive relationship with customers and identify and pursue further customer contact			
7 Be able to close the sale during outbound telephone sales calls	7.1 Perform a trial close to establish whether or not further objections exist 7.2 Gain a commitment from the customer 7.3 Complete the formalities of the sale following organisational procedures 7.4 Provide customer feedback and reaction to products or services to appropriate people in own organisation			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 16: Maintain a Positive and Customer-Friendly Attitude

Unit reference number: R/601/1209

Level: 1

Credit value: 5

Guided learning hours: 33

Unit summary

The learner's attitude and the way the learner behaves towards customers affects customer satisfaction. Simply following procedures may not be enough to provide good customer service. Customers like to deal with organisations whose staff show that they are willing and keen. Customers like to think that staff want to help and they can show this by being friendly and positive and giving customers complete personal attention.

Assessment requirements/evidence requirements

Wherever possible the learner's evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner's communication with customers may be face to face, in writing, by telephone, text message, email, internet (including social networking), intranet or by any other method they would be expected to use within their job role.

The learner needs to include evidence that they are positive and customer-friendly with customers who are:

- 1 easy to deal with
- 2 difficult to deal with.

The learner needs to include evidence that they are positive and customer-friendly:

- 1 during routine delivery of customer service
- 2 during a busy time in their job
- 3 during a quiet time in their job.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Show the right attitude for customer service	1.1	Speak to customers clearly and put them at their ease		
		1.2	Recognise how customers are feeling and establish a rapport with them		
		1.3	Show customers that you are willing and enthusiastic at all times		
		1.4	Recognise that each customer is different and treat them as an individual		
		1.5	Show customers respect at all times and under any circumstances		
		1.6	Show customers that you can be relied on		
		1.7	Show colleagues respect at all times and under any circumstances		
		1.8	Show colleagues that you can be relied on		
2	Show appropriate and positive behaviours to customers	2.1	Recognise and respond when a customer wants or needs attention		
		2.2	Greet customers politely and positively		
		2.3	Focus on customers and ignore distractions which are not important to them		
		2.4	React appropriately to situations that are important enough to interrupt their work with a customer		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		2.5 Thank customers for the information they have given or for doing business with your organisation			
		2.6 Help colleagues to provide good customer service			
3	Know how to maintain a positive and customer friendly attitude	3.1 Identify signs that a customer gives when seeking attention 3.2 Describe what rapport looks, sounds and feels like 3.3 Identify what unimportant distractions are 3.4 Identify what is important enough to interrupt their work with a customer 3.5 Identify positive and negative body language and facial expressions 3.6 State how people are different and have different expectations for many reasons such as their age, culture and personality			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 17: Communicate Using Customer Service Language

Unit reference number: F/601/1609

Level: 1

Credit value: 4

Guided learning hours: 30

Unit summary

This unit is about the language and basic principles that are the heart of customer service and the skills needed to communicate effectively with customers and colleagues. It also covers how the learner fits into the customer service picture in their organisation and the contribution of their job to good customer service. The individual needs to be able to describe and explain the services or products that their organisation offers and how it delivers customer service.

Assessment requirements/evidence requirements

Wherever possible the learner's evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The 'organisation' from which the learner draws their evidence must be the organisation they work for or the organisation in which they have realistic work experience. The 'organisation' may be the whole of the organisation or the business unit, division or department with which they are involved.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Identify customers and their characteristics and expectations	1.1 Recognise typical customers and their expectations 1.2 Discuss customer expectations with colleagues using recognised customer service language 1.3 Follow procedures through which they and their colleagues deliver effective customer service			
2	Identify their organisation's services and products	2.1 Outline their organisation's services and products to customers 2.2 Greet customers politely and positively 2.3 List the information they need to deliver effective customer service and where that information can be found			
3	Know how to communicate using customer service language	3.1 Identify the differences between an internal customer and an external customer 3.2 List their organisation's services or products 3.3 Describe the connection between customer expectations and customer satisfaction in customer service 3.4 Describe why organisation procedures are important to good customer service 3.5 Explain why teamwork is central to good customer service 3.6 Identify the service offer of their organisation			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.7 Identify the part they play in delivering customer service 3.8 Identify who are their customers 3.9 Describe the main characteristics of typical customers that they deal with 3.10 Identify what impresses their customers and what annoys their customers 3.11 Identify who's who and who does what to deliver customer service in their organisation 3.12 Describe the kinds of information they need to give good customer service to customers 3.13 Explain how to find information about their organisation's services or products 3.14 List typical customer service problems in their work and who should be told about them 3.15 Explain how the way they behave affects their customers' service experience			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 18: Recognise and Deal with Customer Queries, Requests and Problems

Unit reference number: M/601/1508

Level: 1

Credit value: 5

Guided learning hours: 33

Unit summary

No matter how good the learner is at providing consistent and reliable customer service, some of their customers will from time to time expect more. They can signal this in various ways and when they do the learner must know how to handle it. Sometimes customers ask different questions and request special treatment. The learner may be able to help them and they certainly need to know who to ask for help if necessary. Some customers may be dissatisfied with the service and may present a problem. The learner's job is to recognise that there is a problem and make sure that the appropriate person deals with it.

Assessment requirements/evidence requirements

Wherever possible the learner's evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is also allowed for evidence within this unit but ideally this should be based on either previous or existing experience from a work placement, a realistic working environment or real work.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner's evidence must include examples of problems which are:

- 1 brought to their attention by customers
- 2 identified first by them and/or by their colleagues.

The problems included in their evidence must include examples of:

- 1 a difference between customer expectations and what is offered by their organisation
- 2 a problem resulting from a system or procedure failure.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Recognise and deal with customer queries and requests	1.1 Deal with queries and requests from customers in a positive and professional way 1.2 Seek information or help from a colleague if they cannot answer their customer's query or request 1.3 Obtain help from a colleague if they are not able to deal with their customer's request 1.4 Always tell their customer what is happening			
2	Recognise and deal with customer problems	2.1 Recognise when something is a problem from the customer's point of view 2.2 Avoid saying or doing anything which may make the problem worse 2.3 Deal with a difficult customer calmly and confidently 2.4 Recognise when to pass a problem on to an appropriate colleague 2.5 Pass the problem on to their colleague with the appropriate information 2.6 Check that the customer knows what is happening			
3	Know how to recognise and deal with customer queries, requests and problems	3.1 List who in the organisation is able to give help and information 3.2 State the limits of what they are allowed to do 3.3 Identify what professional behaviour is 3.4 Describe how to speak to people who are dissatisfied			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.5 Describe how to deal with difficult people 3.6 State what customers normally expect 3.7 Identify how to recognise a problem from what a customer says or does 3.8 Describe what kinds of behaviours/actions would make situations worse 3.9 List the organisational procedures they must follow when they deal with problems or complaints 3.10 Identify the types of behaviour that may make a problem worse			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 19: Take Details of Customer Service Problems

Unit reference number: T/601/1509

Level: 1

Credit value: 4

Guided learning hours: 27

Unit summary

However good the customer service of the learner's organisation is, some problems will occur. Learners may not have the authority or experience to deal with the problem by themselves so it is important to collect helpful information for those who will deal with it. The learner will need to be able to identify that there is a problem, discover detailed information about that problem and pass on the information so that the problem can be tackled. This unit is about how to collect information about a customer service problem, pass it to the right people in the organisation and keep the customer informed about what is being done.

Assessment requirements/evidence requirements

Wherever possible the learner's evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is also allowed for evidence within this unit but ideally this should be based on either previous or existing experience from a work placement, a realistic working environment or real work.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions.

The learner needs to include evidence of taking details of customer service problems from customers who are:

1. easy to deal with
2. difficult to deal with.

The learner may include evidence that they have passed details to a colleague able to deal with the problem either verbally or in writing.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Respond to customers who raise a problem	1.1 Recognise when their customer is raising a problem 1.2 Respond to their customer calmly and helpfully 1.3 Take details that will identify their customer			
2	Gather details from customers who raise a problem	2.1 Ask their customer questions to clarify what has or has not happened to cause a problem 2.2 Check their understanding of what their customer sees as the problem 2.3 Ask their customer questions to clarify the customer's expectations about the service or product that is now causing a problem 2.4 Note the details of what their customer tells them about the problem 2.5 Confirm with their customer details of what the customer has told them about the problem			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Pass details of problems raised by customers to the colleague who can deal with them	3.1	Collect details of any reference codes or identifiers which their organisation uses to identify the customer transaction that is now causing a problem		
		3.2	Gather any other details that are relevant to resolving the problem from colleagues, customer service records or product specifications		
		3.3	Tell their customer what they will do with the details of the problem so that action is taken		
		3.4	Tell their customer what to expect without making customer service promises that may not be met		
		3.5	Pass the details to a colleague who is able to deal with the problem		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Know how to take details of customer service problems	4.1 Identify customer expectations of the organisation's services or products that may cause problems if they are not met			
		4.2 Describe how to respond to customers who raise problems in a way that the customers will find calm and helpful			
		4.3 Name reference codes or identifiers their organisation uses to identify customers			
		4.4 Identify questions that can be used to gather information that will be most helpful in resolving a problem			
		4.5 State details their organisation needs to resolve a problem			
		4.6 Describe details their organisation uses to identify specific customer transactions			
		4.7 Name the appropriate colleagues to whom details of problems should be passed			
		4.8 Identify their organisation's preferences for the way in which details of problems should be passed on			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 20: Develop Your Own Customer Service Skills Through Self-Study

Unit reference number: R/601/1548

Level: 2

Credit value: 6

Guided learning hours: 40

Unit summary

Much of the responsibility for developing customer service knowledge and skills rests on the learner as an individual. There are numerous sources of information that can be used but which need to be located and linked with their customer service role. When located, the learning materials must be used to good effect in an organised manner. This unit is about locating and using materials to help the learner learn in the course of their work. It is the right unit for a learner who needs to take responsibility for their own self development in relation to customer service skills.

Assessment requirements/evidence requirements

The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner's evidence must show that they have taken personal responsibility for identifying, locating and using learning materials with only limited guidance and support from their line manager, mentor or colleagues.

The information sources and learning materials referred to in the learner's evidence may be any or all of the following:

- 1 paper based
- 2 online or other electronic media
- 3 structured discussions.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Find ways to learn more about customer service and their job	1.1 Identify different sources of information and support that will help them to develop their customer service knowledge and skills 1.2 Agree with their line manager, their mentor or others doing a similar job the best sources to use for self-development of their customer service knowledge and skills 1.3 Take action to remind themselves to check on sources of information and support 1.4 Search for additional sources of information to support their customer service learning 1.5 Store materials that support self-study for future use 1.6 Plan time to study the self-study materials they have collected			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Use sources of self development to extend their customer service skills and knowledge	2.1	Access organisational update information to extend their knowledge of products and services		
		2.2	Access organisational information to learn more about the way their role contributes to customer service		
		2.3	Monitor publications to identify ideas and new developments in customer service which they could apply in their work		
		2.4	Study collected information to develop their own customer service knowledge and skills		
		2.5	Take action resulting from their learning to change the way they deal with customers		
		2.6	Share their plans for action with their line manager, their mentor or others doing a similar job to seek those people's ideas for further options		
		2.7	Record actions they take to learn more about customer service and identify those which have the most positive effects		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Know how to develop their own customer service skills through self-study	3.1 Describe ways to locate information updating them on services and products in their information			
		3.2 Identify sources of information about customer service knowledge and skills that will help them to develop			
		3.3 List ways to store information that they use to develop their customer service skills			
		3.4 Describe the importance of focus when self studying to improve their customer service knowledge and skills			
		3.5 Identify ways to convert information or ideas they have found through self-study into practical customer service actions			
		3.6 Identify the value of discussing their learning with their line manager, their mentor or others doing a similar job			
		3.7 Evaluate methods of recording actions to improve their customer service skills which have had positive effects			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 21: Use Systems and Technology During Customer Contact in a Contact Centre

Unit reference number: J/503/0362

Level: 2

Credit value: 4

Guided learning hours: 24

Unit summary

This unit concerns being able to use features of systems and technology to handle customer contacts in a contact centre, report on customer and contact handling information using pre-defined formats and understand the uses of contact centre systems and technology.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to use features of systems and technology to handle customer contacts in a contact centre	1.1			
		1.2			
		1.3			
		1.4			
2	Be able to report on customer and contact handling information using pre-defined formats	2.1			
		2.2			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand the uses of contact centre systems and technology	3.1	Explain the benefits of different technology systems in terms of their ability to facilitate communication with customers		
		3.2	Describe the products and/or services offered or supported by the contact centre		
		3.3	Describe the organisational requirements and regulation or legislation that have an impact on the contact centre's operations		
		3.4	Describe the organisational procedures and guidelines for customer contact handling		
		3.5	Describe the purpose of contact distribution systems and how the organisation's system works		
		3.6	State the reasons for checking the sense of reports before issuing		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 22: **Deliver Customer Service Through a Contact Centre**

Unit reference number: K/503/0385

Level: 2

Credit value: 5

Guided learning hours: 12

Unit summary

This unit concerns being able to establish rapport with customers in a contact centre, support customer service delivery, deliver customer service and understand customer service in contact centres.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to establish rapport with customers in a contact centre	<p>1.1 Follow organisational guidelines for greeting and identifying customers</p> <p>1.2 Explain the features and benefits of products and/or services to customers in accordance with organisational requirements</p> <p>1.3 Provide the required information in response to customer requests</p> <p>1.4 Check customers' understanding of the information provided</p> <p>1.5 Identify options for the resolution of customers' queries that meet their needs</p> <p>1.6 Close the customer contact in accordance with organisational guidelines</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Be able to support customer service delivery through a contact centre	2.1 Identify precisely customers' needs or requests			
		2.2 Check understanding of customers' needs by summarising their queries and requests			
		2.3 Keep records of customer queries or requests in accordance with organisational procedures			
		2.4 Use information collected from customers to enhance customer service delivery			
3	Be able to deliver customer service in a contact centre	3.1 Establish the limit of their authority for dealing with customers			
		3.2 Explain to customers when their enquiry must be referred to someone else because authority limits have been exceeded			
		3.3 Comply with regulatory requirements during customer contacts			
		3.4 Explain the regulatory constraints to the customer when they affect customer service			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Understand customer service in contact centres	4.1			
		Describe the limitations of the service offer that can be made to customers			
		4.2			
		Describe the limits of authority in dealing with customers			
		4.3			
		Explain the importance of checking customers' understanding of information provided			
		4.4			
		Explain the importance of closing a customer contact in a professional way in accordance with organisational procedures and standards			
		4.5			
		Describe the sources of information to be checked in order to update knowledge and understanding of organisational and regulatory requirements			
		4.6			
		Explain the importance of understanding the customer's message			
		4.7			
		Describe methods of adapting communication with customers to meet their expectations			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 23: Carry out Direct Sales Activities in a Contact Centre

Unit reference number: L/503/0394

Level: 2

Credit value: 5

Guided learning hours: 15

Unit summary

This unit concerns being able to gather information needed for direct sales activities in a contact centre, carry out direct sales to customers, keep direct sales records, comply with regulations and legislation during direct sales and understand how to conduct sales activities in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to gather information needed for direct sales activities in a contact centre	1.1 Assemble information about products and/or services that support direct sales 1.2 Obtain from customers sufficient information to support direct sales activities 1.3 Create sales opportunities by making links between information provided by customers and products and/or services 1.4 Find potential new customers for products and/or services			
2	Be able to carry out direct sales to customers through a contact centre	2.1 Establish customers' identity in accordance with organisational procedures 2.2 Check customers' wishes and needs 2.3 Identify possible matches with products and/or services from information provided by customers 2.4 Explain to customers the features and benefits of products and/or services for sale 2.5 Adapt their sales approach and style to meet customer preferences 2.6 Maximise opportunities for cross-selling and up-selling 2.7 Complete the authorisation or payment in accordance with organisational procedures			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to keep direct sales records within a contact centre	3.1 Identify the information about customers, products and/or services that should be recorded during the sales process			
		3.2 Record customer, product and/or service information in accordance with organisational procedures			
4	Be able to comply with regulations and legislation during direct sales in a contact centre	4.1 Identify the regulatory requirements that have an impact on direct sales activities through a contact centre			
		4.2 Ensure compliance with regulations during direct selling through a contact centre			
5	Understand how to conduct sales activities in a contact centre	5.1 Describe the features and benefits of the products and/or services offered or supported by the contact centre			
		5.2 Describe the organisational policies and procedures for direct sales through a contact centre			
		5.3 Describe the organisational requirements and regulation or legislation that have an impact on direct sales activities			
		5.4 Describe the common objections and questions raised by customers during direct selling			
		5.5 Explain how to identify cross-selling and up-selling opportunities			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	5.6 Describe different methods of researching potential new customers 5.7 Explain how to retrieve information from organisational sales records 5.8 Describe the organisational procedures for ensuring compliance with relevant regulation and legislation that have an impact on direct selling			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 24:

Communicate Information to Customers in Different but Familiar Contexts Through a Contact Centre

Unit reference number: H/503/0403

Level: 2

Credit value: 4

Guided learning hours: 12

Unit summary

This unit concerns being able to talk to customers on familiar subjects in a contact centre, communicate in writing on familiar subjects and understand the requirements of customer communication in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to talk to customers on familiar subjects in a contact centre	1.1 Establish a rapport with customers in accordance with organisational guidelines 1.2 Describe products and/or services to customers in accordance with organisational guidelines 1.3 Provide the required information in response to customer questions about products and/or services 1.4 Vary the tone of voice to maintain customers' interest in products and/or services 1.5 Display "active listening" by replaying customers' comments back to them			
2	Be able to communicate in writing on familiar subjects in a contact centre	2.1 Identify when a customer contact would benefit from written communications 2.2 Produce written communications in accordance with organisational guidelines 2.3 Comply with recommended formats and layouts for written communications with customers 2.4 Ensure that written communications are concise and the meaning is clear 2.5 Ensure that written communications are accurate in content, spelling and grammar and conform with organisational guidelines before despatch			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand the requirements of customer communication in a contact centre	3.1 Describe the products and/or services offered or supported by the contact centre			
		3.2 Describe the organisational requirements and regulations about what can and cannot be expressed to customers verbally and/or in writing			
		3.3 Explain what information is best given to customers verbally and what is best given in writing			
		3.4 Explain how positive and negative language affects communications with customers verbally and/or in writing			
		3.5 List the frequently asked questions from customers about products and/or services and responses to them			
		3.6 Explain the importance of varying tone when talking to customers			
		3.7 Explain the benefits and drawbacks of communicating with customers by telephone and in writing			
		3.8 Explain the importance of reviewing and proof-reading before sending written communications to customers			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 25: **Provide Support Through a Contact Centre for Specified Products and/or Services**

Unit reference number: L/503/0413

Level: 2

Credit value: 4

Guided learning hours: 18

Unit summary

This unit concerns being able to establish and validate customers' identity, support customer needs for information and decisions about a range of products and/or services and understand support for customers in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to establish and validate customers' identity in a contact centre	<p>1.1 Link customers' identities with correct organisational records</p> <p>1.2 Confirm customers' identities and authorities in accordance with organisational procedures</p> <p>1.3 Record any departure from the standard authorisation process in accordance with organisational procedures</p> <p>1.4 Explain to customers the reasons for the authorisation procedures</p>			
2	Be able to support customer needs for information and decisions about a range of products and/or services in a contact centre	<p>2.1 Provide customers with the required information across a range of products and/or services</p> <p>2.2 Use language and conversation in accordance with organisational guidelines</p> <p>2.3 Make use of the features of communication equipment specified within the job role</p> <p>2.4 Offer customers options for different requests about products and/or services that meet their requirements</p> <p>2.5 Resolve customers' problems within their level of authority</p> <p>2.6 Refer customers to someone with greater authority when customers' needs cannot be met within the limits of their authority</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		2.7 Comply with organisational procedures during customer contacts			
3	Understand how to support customers in a contact centre	3.1 Describe the features and uses of products and/or services with which they can deal 3.2 Describe ways of maintaining and updating knowledge and understanding of products and/or services 3.3 Explain the regulations and legislation that have an impact on contact with customers			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

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Internal verifier signature: _____

Date: _____

(if sampled)

Unit 26: Deal with Incidents Through a Contact Centre

Unit reference number: K/503/0421

Level: 2

Credit value: 7

Guided learning hours: 40

Unit summary

This unit concerns being able to deal with incidents through a contact centre, use contact centre communications systems to deploy incident management resources and understand how to deal with incidents in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to deal with incidents through a contact centre	1.1 Respond to incoming calls in a calm and professional manner			
		1.2 Maintain control of the conversation			
		1.3 Record the contact and information in an incident log in accordance with organisational procedures			
		1.4 Assess and prioritise reported incidents in accordance with organisational procedures			
		1.5 Pass accurate and concise contact information to those responsible for taking action in accordance with organisational procedures			
		1.6 Provide information, advice and support in response to requests in accordance with organisational procedures			
		1.7 Escalate incident responses in accordance with organisational procedures			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Be able to use contact centre communications systems to deploy incident management resources	<p>2.1 Communicate with external organisations in accordance with organisational procedures</p> <p>2.2 Use the most efficient means (voice or data options) to communicate with those dealing with the incident</p> <p>2.3 Use agreed conventions of wording, style and approach appropriate for different communication media</p>			
3	Understand how to deal with incidents in a contact centre	<p>3.1 Describe the incident management services offered by the contact centre</p> <p>3.2 Describe the impact of regulation or legislation on incident management</p> <p>3.3 Describe the purpose and use of decision trees</p> <p>3.4 Describe how to determine the appropriate allocation of resources to incidents</p> <p>3.5 Describe the boundaries of a contact incident that justify actions being escalated to different levels of response</p> <p>3.6 Describe the nature and limits of instructions and advice that can be passed on to a contact reporting an incident</p> <p>3.7 Describe standard wording and codes used by the organisation when dealing with incident management</p> <p>3.8 Describe the type and extent of resources available for deployment in incident management</p>			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

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Internal verifier signature: _____

Date: _____

(if sampled)

Unit 27: Support Customers and Colleagues when Providing Contact Centre Services

Unit reference number: J/503/0426

Level: 3

Credit value: 5

Guided learning hours: 15

Unit summary

This unit concerns being able to communicate information about products and/or services in a contact centre, monitor compliance with organisational requirements for customer contacts, provide advice and support to colleagues and understand how to support colleagues and customers in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to communicate information about products and/or services to customers in a contact centre	1.1 Validate customers' identity in accordance with organisational procedures 1.2 Give customers an overview of products and/or services in accordance with organisational procedures for language and conversation 1.3 Resolve customers' problems and queries in a contact centre within their level of authority 1.4 Assist customers with decisions about products and/or services in accordance with organisational guidelines, relevant regulation or legislation 1.5 Refer customers to someone with greater authority when customers' requests or problems are beyond their level of authority 1.6 Record customer problems and complaints in accordance with organisational procedures			
2	Be able to monitor compliance with organisational requirements for customer contacts	2.1 Monitor compliance with organisational requirements for customer contacts against agreed criteria 2.2 Deal with breaches of organisational requirements in accordance with organisational procedures			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to provide advice and support to colleagues in a contact centre	3.1 Provide advice on matters relating to customers' identity, personal security and products and/or services that meets organisational standards and legislative or regulatory requirements			
		3.2 Provide support that increases colleagues' understanding of organisational requirements and constraints on customer contacts that is commensurate with their needs			
4	Understand how to support colleagues and customers in a contact centre	4.1 Explain the effect of organisational and regulatory requirements on supporting colleagues and customers			
		4.2 Explain what constitutes non-compliance with legal and regulatory requirements and the implications of this			
		4.3 Describe different sources of information about the organisation's products and/or services			
		4.4 Explain how to update and maintain knowledge and understanding of products and/or services			
		4.5 Explain the organisational systems for identifying customers and related personal security matters			
		4.6 Explain how buddying and assisting colleagues with handling customer contacts increases understanding of organisational requirements			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 28: Word Processing Software

Unit reference number: L/502/4627

Level: 1

Credit value: 3

Guided learning hours: 20

Unit summary

This is the ability to use a software application designed for the creation, editing and production of largely text-based documents.

This unit is about the skills and knowledge required by an IT user to use a range of basic word processing software tools and techniques to produce appropriate, straightforward or routine documents. Any aspect that is unfamiliar will require support and advice from others.

Word processing tools and techniques will be described as 'basic' because:

- the software tools and functions will be predetermined or commonly used; and
- the techniques needed for text entry, manipulation and outputting will be straightforward or routine.

Forbidden combinations

This unit must not be taken with *Word Processing Software (Level 2)* (R/502/4628).

Assessment requirements/evidence requirements

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of
- contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

All ITQ units may be assessed using any method, or combination of methods, which clearly demonstrates that the learning outcomes and assessment criteria have been met.

Whilst assessors are required to have a sound understanding of the unit requirements and be able to give appropriate feedback to learners, they do not have to be A1 qualified. However, ideally every assessor should have ITQ Level 3 or equivalent in order to be able to adequately assess at that level and below.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Enter, edit and combine text and other information accurately within word processing documents	1.1	Identify what types of information are needed in documents		
		1.2	Identify what templates are available and when to use them		
		1.3	Use keyboard or other input method to enter or insert text and other information		
		1.4	Combine information of different types or from different sources into a document		
		1.5	Enter information into existing tables, forms and templates		
		1.6	Use editing tools to amend document content		
		1.7	Store and retrieve document files effectively, in line with local guidelines and conventions where available		
2	Structure information within word processing documents	2.1	Create and modify tables to organise tabular or numeric information		
		2.2	Select and apply heading styles to text		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Use word processing software tools to format and present documents	3.1 Identify what formatting to use to enhance presentation of the document			
		3.2 Select and use appropriate techniques to format characters and paragraphs			
		3.3 Select and use appropriate page layout to present and print documents			
		3.4 Check documents meet needs, using IT tools and making corrections as necessary			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 29: Using the Internet

Unit reference number: A/502/4297

Level: 2

Credit value: 4

Guided learning hours: 30

Unit summary

This unit is about the skills and knowledge needed by the IT User to understand and make effective use of a connection method and intermediate Internet software tools and techniques to search for and exchange information for, at times, non-routine or unfamiliar activities. Any aspect that is unfamiliar may require support and advice from others.

Internet tools and techniques at this level will be defined as:

- the software tools and functions will be at times non-routine or unfamiliar; and
- the range of techniques used for searching and exchanging information will involve a number of steps and at times be non-routine or unfamiliar.

An activity will typically be 'non-routine or unfamiliar' because:

- the task or context is likely to require some analysis, clarification or research (to separate the components and to identify what factors need to be considered, for example, time available, audience needs, accessibility of source, types of content and meaning) before an approach can be planned; and
- the user will take some responsibility for the selecting how to search for and exchange the information.

Assessment requirements/evidence requirements

Evidence of achievement can be derived from a variety of sources.

Learners who use their IT skills directly in their day-to-day work can prove their competence whilst doing so. Alternatively learners can use scenarios and knowledge tests – or a mixture of both – to demonstrate competence.

Assessment methodology

All ITQ units may be assessed using any method, or combination of methods, which clearly demonstrates that the learning outcomes and assessment criteria have been met.

Whilst assessors are required to have a sound understanding of the unit requirements and be able to give appropriate feedback to learners, they do not have to be A1 qualified. However, ideally every assessor should have ITQ Level 3 or equivalent in order to be able to adequately assess at that level and below.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Connect to the Internet	1.1 Identify different types of connection methods that can be used to access the Internet 1.2 Identify the benefits and drawbacks of the connection method used 1.3 Get online with an Internet connection 1.4 Use help facilities to solve Internet connection problems			
2 Use browser software to navigate webpages effectively	2.1 Select and use browser tools to navigate webpages 2.2 Identify when to change settings to aid navigation 2.3 Adjust browser settings to optimise performance and meet needs 2.4 Identify ways to improve the performance of a browser			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Use browser tools to search for information from the internet	3.1 Select and use appropriate search techniques to locate information efficiently			
		3.2 Describe how well information meets requirements			
		3.3 Manage and use references to make it easier to find information another time			
		3.4 Download, organise and store different types of information from the Internet			
4	Use browser software to communicate information online	4.1 Identify opportunities to create, post or publish material to websites			
		4.2 Select and use appropriate tools and techniques to communicate information online			
		4.3 Use browser tools to share information sources with others			
		4.4 Submit information online			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
5	Understand the need for safety and security practices when working online	5.1 Describe the threats to system performance when working online			
		5.2 Work responsibly and take appropriate safety and security precautions when working online			
		5.3 Describe the threats to information security when working online			
		5.4 Manage personal access to online sources securely			
		5.5 Describe the threats to user safety when working online			
		5.6 Describe how to minimise internet security risks			
		5.7 Apply laws, guidelines and procedures for safe and secure Internet use			
		5.8 Explain the importance of the relevant laws affecting Internet users			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

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Internal verifier signature: _____

Date: _____

(if sampled)

Unit 30: IT Communication Fundamentals

Unit reference number: D/502/4292

Level: 2

Credit value: 2

Guided learning hours: 15

Unit summary

This unit is about the skills and knowledge needed by the IT User to select and use a varied range of appropriate IT tools and techniques to find and review information and send and receive messages using IT-based communication systems to independently respond to activities that are at times non-routine or unfamiliar. Any aspect that is unfamiliar will require support and advice from others.

An activity will typically be 'non-routine or unfamiliar' because:

- the task or context is likely to require some analysis, clarification or research (to separate the components and to identify what factors need to be considered, for example, time available, audience needs, accessibility of source, types of content and meaning) before an approach can be planned;
- the user will take some responsibility for developing the input or output of information; and
- the techniques required will involve a number of steps and at times be non-routine or unfamiliar.

Assessment requirements/evidence requirements

Evidence of achievement can be derived from a variety of sources.

Learners who use their IT skills directly in their day-to-day work can prove their competence whilst doing so. Alternatively learners can use scenarios and knowledge tests – or a mixture of both – to demonstrate competence.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

All ITQ units may be assessed using any method, or combination of methods, which clearly demonstrates that the learning outcomes and assessment criteria have been met.

Whilst assessors are required to have a sound understanding of the unit requirements and be able to give appropriate feedback to learners, they do not have to be A1 qualified. However, ideally every assessor should have ITQ Level 3 or equivalent in order to be able to adequately assess at that level and below.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Select and use a variety of sources of information to meet needs	1.1 Select and use appropriate sources of IT-based and other forms of information which match requirements			
		1.2 Describe different features of information			
		1.3 Recognise copyright and other constraints on the use of information			
2	Access, search for, select and use Internet-based information and evaluate its fitness for purpose	2.1 Access, navigate and search internet sources of information purposefully and effectively			
		2.2 Use appropriate search techniques to locate relevant information			
		2.3 Use discrimination to select information that matches requirements and is fit for purpose			
		2.4 Evaluate information to make sure it matches requirements and is fit for purpose			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Select and use IT to communicate and exchange information safely, responsibly and effectively	3.1 Create, access, read and respond appropriately to e-mail and other IT-based communication, including attachments, and adapt style to suit audience			
		3.2 Use IT tools to manage an address book and schedule activities			
		3.3 Manage storage of IT-based communications			
		3.4 Describe how to respond to common IT-based communication problem			
		3.5 Respond appropriately to common IT-based communication problems			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 31: Using Email

Unit reference number: M/502/4300

Level: 2

Credit value: 3

Guided learning hours: 20

Unit summary

This is the ability to make the best use of email software to safely and securely send, receive and store messages.

This unit is about the skills and knowledge to make effective use of a range of intermediate e-mail software tools to send, receive and store messages for, at times, non-routine or unfamiliar activities. Any aspect that is unfamiliar may require support and advice from others.

Email tools and techniques will be defined as 'intermediate' because:

- the software tools and functions will be at times non-routine or unfamiliar; and
- the techniques required will involve a number of steps and at times be non-routine or unfamiliar.

An activity will typically be 'non-routine or unfamiliar' because:

- the task or context is likely to require some analysis, clarification or research (to separate the components and to identify what factors need to be considered, for example, time available, audience needs, accessibility of source, types of content and meaning) before an approach can be planned; and
- the user will take some responsibility for developing the input or output of information.

Assessment requirements/evidence requirements

Evidence of achievement can be derived from a variety of sources. Learners who use their IT skills directly in their day-to-day work can prove their competence whilst doing so. Alternatively learners can use scenarios and knowledge tests – or a mixture of both – to demonstrate competence.

Assessment methodology

All ITQ units may be assessed using any method, or combination of methods, which clearly demonstrates that the learning outcomes and assessment criteria have been met.

Whilst assessors are required to have a sound understanding of the unit requirements and be able to give appropriate feedback to learners, they do not have to be A1 qualified. However, ideally every assessor should have ITQ Level 3 or equivalent in order to be able to adequately assess at that level and below.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Use e-mail software tools and techniques to compose and send messages	1.1 Select and use software tools to compose and format e-mail messages, including attachments 1.2 Determine the message size and how it can be reduced 1.3 Send e-mail messages to individuals and groups 1.4 Describe how to stay safe and respect others when using e-mail 1.5 Use an address book to organise contact information			
2	Manage incoming e-mail effectively	2.1 Follow guidelines and procedures for using e-mail 2.2 Read and respond to e-mail messages appropriately 2.3 Use email software tools and techniques to automate responses 2.4 Describe how to archive e-mail messages, including attachments 2.5 Organise, store and archive e-mail messages effectively 2.6 Respond appropriately to e-mail problems			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 32: Using Collaborative Technologies

Unit reference number: F/502/4379

Level: 2

Credit value: 4

Guided learning hours: 30

Unit summary

This is the ability to use IT tools and devices for collaborative working and communications, such as web or video conferencing, instant messaging/chat, online phone and video calls, online forums, social networking sites, wikis and other centralised depositories for documents, blogging, RSS and data feeds, bulk SMS or online work management tools. This unit is about the skills and knowledge to facilitate the use of appropriate combinations of IT tools and devices for groups to work collaboratively by:

- planning and selecting the IT tools and devices to be used for work
- purposes and tasks
- preparing and setting up access to collaborative technologies
- presenting information and facilitating others' contributions; and
- moderating the use of collaborative technologies.

Forbidden combinations

This unit must not be taken with *Using Collaborative Technologies (Level 1)* (A/502/4378).

Assessment requirements/evidence requirements

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eSkills UK and the awarding body.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

All ITQ units may be assessed using any method, or combination of methods, which clearly demonstrates that the learning outcomes and assessment criteria have been met.

Whilst assessors are required to have a sound understanding of the unit requirements and be able to give appropriate feedback to learners, they do not have to be A1 qualified. However, ideally every assessor should have ITQ Level 3 or equivalent in order to be able to adequately assess at that level and below.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Stay safe and secure when working with collaborative technology	1.1 Take appropriate steps to avoid risks when working with collaborative technology, in line with relevant guidelines			
		1.2 Explain what risks there may be in using collaborative technology and how to keep them to a minimum			
		1.3 Use appropriate methods to promote trust when working collaboratively			
		1.4 Carry out appropriate checks on others' online identities and different types of information			
		1.5 Identify and respond to inappropriate content and behaviour			
2	Plan and set up IT tools and devices for collaborative working	2.1 Describe the purposes for using collaborative technologies			
		2.2 Describe what outcomes are needed from collaborative working and whether or not archiving is required			
		2.3 Describe the roles, IT tools and facilities needed for collaborative tasks and communication media			
		2.4 Describe the features, benefits and limitations of different collaborative technology tools and devices			
		2.5 Describe the compatibility issues in different combinations of collaborative tools and devices			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		2.6 Select an appropriate combination of IT tools and devices to carry out collaborative tasks			
		2.7 Connect and configure the combination of IT tools and devices needed for a collaborative task			
3	Prepare collaborative technologies for use	3.1 Describe what access rights and issues others may have in using collaborative technologies 3.2 Assess what permissions are needed for different users and content 3.3 Set up and use access rights to enable others to access information 3.4 Set up and use permissions to filter information 3.5 Adjust settings so that others can access IT tools and devices for collaborative working 3.6 Select and use different elements to control environments for collaborative technologies 3.7 Select and join networks and data feeds to manage data to suit collaborative tasks			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Contribute to tasks using collaborative techniques	4.1 Describe rules of engagement for using collaborative tasks			
		4.2 Enable others to contribute responsibly to collaborative technologies			
		4.3 Present relevant and valuable information			
		4.4 Moderate the use of collaborative technologies			
		4.5 Archive the outcome of collaborative working			
		4.6 Assess when there is a problem with collaborative technologies and when to get expert help			
		4.7 Respond to problems with collaborative technologies			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 33: **Bespoke Software**

Unit reference number: F/502/4396

Level: 2

Credit value: 3

Guided learning hours: 20

Unit summary

This is the ability to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively.

This unit is about the skills and knowledge needed by an IT user to select and use a wide range of intermediate bespoke software tools and techniques for information that is at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.

Bespoke software tools and techniques will be defined as 'intermediate' because:

- the software tools and functions involved will at times be non-routine or unfamiliar;
- the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements and at times be multi-step;
- the user will take some responsibility for inputting, manipulating and outputting the information.

Forbidden combination

This unit must not be taken with *Bespoke Software (A/502/4395)*.

Assessment requirements/evidence requirements

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion

- other methods which have been approved by eskills UK and the awarding body.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

All ITQ units may be assessed using any method, or combination of methods, which clearly demonstrates that the learning outcomes and assessment criteria have been met.

Whilst assessors are required to have a sound understanding of the unit requirements and be able to give appropriate feedback to learners, they do not have to be A1 qualified. However, ideally every assessor should have ITQ Level 3 or equivalent in order to be able to adequately assess at that level and below.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Input and combine information using bespoke applications	1.1 Input relevant information accurately so that it is ready for processing 1.2 Select and use appropriate techniques to link and combine information of different forms or from different sources within the software 1.3 Respond appropriately to data entry error messages			
2	Use appropriate structures to organise and retrieve information efficiently	2.1 Describe what functions to apply to structure and layout information effectively 2.2 Select and use appropriate structures and/or layouts to organise information 2.3 Apply local and/or legal guidelines and conventions for the storage and use of data where available			
3	Use the functions of the software effectively to process and present information	3.1 Select and use appropriate tools and techniques to edit, process and format information 3.2 Check information meets needs, using IT tools and making corrections as necessary 3.3 Select and use appropriate methods to present information			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 34: Handling Objections and Closing Sales

Unit reference number: M/502/8606

Level: 2

Credit value: 3

Guided learning hours: 22

Unit summary

This unit is about the process of handling customer objections. This requires a knowledge of company procedures and processes and methods to overcome objections. The unit also investigates ways of closing a sale.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand how to handle sales objections	1.1 Explain the difference between standard and non-standard sales objections 1.2 Explain how to clarify objections and identify potential sales opportunities from them 1.3 Describe how to use questioning techniques to explore and resolve customer issues 1.4 Explain how to empathise with and reassure the customer 1.5 Explain the difference between hypothetical and real objections 1.6 Explain how knowledge of products and services can be used to answer objections 1.7 Explain how competitor activity may affect the potential sale 1.8 Describe how industry/sector pricing structures may have an impact on sales objections 1.9 Explain the scope of authority and responsibility when dealing with objections 1.10 State who to go to when in need of support to overcome objections			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Understand how to close the sale	2.1 Explain how to identify verbal and non-verbal buying signals as signs of whether to move towards closing the sale			
		2.2 Explain how to perform a trial close			
		2.3 Explain how to identify further potential add-on, up-selling or cross-selling opportunities prior to closing the sale			
		2.4 Explain potential barriers to closing the sale			
		2.5 Explain a range of ways to close the sale			
3	Be able to handle objections	3.1 Clarify the nature and extent of objections			
		3.2 Explain to the customer the concessions available within the scope of authority			
		3.3 Follow organisational procedures for dealing with objections			
		3.4 Promote the benefits of products and/or services to overcome objections			
		3.5 Use testimonials to overcome objections			
		3.6 Refer to those in authority when dealing with objections outside the scope of own authority			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to close the sale	4.1 Perform a trial close and ask for the order when objections have been met 4.2 Make use of add-on, up-selling or cross-selling opportunities 4.3 Follow organisational procedures for accepting confirmation of an order			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 35: Time Planning in Sales

Unit reference number: F/502/8559

Level: 2

Credit value: 2

Guided learning hours: 13

Unit summary

This unit aims to develop knowledge, understanding and skills in planning and evaluating time management in a sales role.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand how to manage and prioritise time in a sales role	<p>1.1 Explain the importance of time management and its impact on sales objectives</p> <p>1.2 Describe how a sales team member uses and measures the use of time</p> <p>1.3 Describe best practice time management techniques</p> <p>1.4 Explain how to review the use of time spent on sales activities</p>			
2	Be able to plan own time in a sales role	<p>2.1 Identify own long-term sales commitments and immediate goals</p> <p>2.2 Identify work-related priorities</p> <p>2.3 Identify the differences between tasks that are urgent and tasks that are important</p> <p>2.4 Consolidate tasks to reduce workload and time wastage</p> <p>2.5 Identify opportunities to gain support from others to complete work</p> <p>2.6 Develop a time plan or weekly schedule, prioritising all tasks in order of relative importance and urgency</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to evaluate time planning in a sales role	3.1 Identify unnecessary tasks that are not directly related to own objectives 3.2 Use feedback from colleagues to identify strengths and weaknesses in the use of own time 3.3 Identify productive periods of time 3.4 Identify the opportunities for improving the use of time			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 36: Inputting and Accessing Sales or Marketing Data in Information Systems

Unit reference number: D/502/8584

Level: 2

Credit value: 2

Guided learning hours: 15

Unit summary

This unit aims to provide the skills and knowledge required to input and access sales or marketing data and information.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand how to input and access sales or marketing data in information systems	1.1 Explain the uses of IT in the sales or marketing function			
		1.2 Identify why information is needed for sales or marketing activities			
		1.3 Describe how sufficient, valid and reliable sources of sales or marketing information can be gathered			
		1.4 Explain the reasons for using an established data storage system			
		1.5 Describe the role, advantages and disadvantages of manual and computerised systems			
		1.6 Explain ways of classifying sales or marketing information and the protocol for data storage			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Understand the use of sales or marketing information sources and systems	<p>2.1 Explain methods of presenting sales or marketing information</p> <p>2.2 Describe the features of software and hardware used to manage sales or marketing information</p> <p>2.3 Describe how to plan and organise searches for sales or marketing information</p> <p>2.4 Explain the implications of entering incorrect sales or marketing data</p> <p>2.5 Explain why certain types of sales or marketing information are confidential</p> <p>2.6 Explain the scope of own authority and responsibility when using sales or marketing information and databases</p> <p>2.7 Explain the actions to be taken in the case of a breach of confidentiality</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to input and use databases to support sales or marketing activities	3.1 Gather sales or marketing information 3.2 Identify potential information sources that are likely to support planned sales or marketing activities 3.3 Follow organisational procedures to report concerns about security/confidentiality 3.4 Use sales information gathered to support specified sales or marketing activities 3.5 Input and update sales or marketing information on the database so that it can be accessed and used to support sales activities in the future			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

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Internal verifier signature: _____

Date: _____

(if sampled)

Unit 37: Develop Working Relationships with Colleagues

Unit reference number: H/600/9660

Level: 2

Credit value: 3

Guided learning hours: 15

Unit summary

This unit will help learners to establish and develop effective working relationships with colleagues.

Assessment requirements/evidence requirements

Assessment must be carried out in way that is consistent with the requirements outlined in *Annexe D: Assessment Strategy*.

To pass the unit, learners must meet all of the assessment criteria.

Assessment methodology

This unit is assessed using evidence from the workplace, ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc.

Simulation is not allowed.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the benefits of working with colleagues.	1.1 Describe the benefits of productive working relationships			
2	Be able to establish working relationships with colleagues	2.1 Identify colleagues within own and other organisations. 2.2 Agree the roles and responsibilities for colleagues.			
3	Be able to act in a professional and respectful manner when working with colleagues	3.1 Explain how to display behaviour that shows professionalism			
4	Be able to communicate with colleagues.	4.1 Identify, information to others clearly and concisely. 4.2 Explain how to receive and clarify own understanding of information.			
5	Be able to identify potential work-related difficulties and explore solutions.	5.1 Identify potential work-related difficulties and conflicts of interest. 5.2 Explain how to resolve identified potential difficulties.			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 38: Promote Additional Services or Products to Customers

Unit reference number: D/601/0936

Level: 2

Credit value: 6

Guided learning hours: 40

Unit summary

Services or products are continually changing in organisations to keep up with customers' expectations. By offering new or improved services or products the organisation can increase customer satisfaction. Many organisations must promote these to be able to survive in a competitive world. However, it is equally important for organisations that are not in competition with others to encourage their customers to try new services or products. This unit is about the learners' need to keep pace with new developments and to encourage customers to take an interest in them. Customers expect more and more services or products to be offered to meet their own growing expectations. They need to be made aware of what is available from the organisation. Because of this everybody offering services or products needs to play a part in making customers aware of what is available. Learners should not choose this unit if their organisation does not want them to suggest additional service or products to customers.

Assessment requirements/evidence requirements

- 1 Learners' evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real clients, whether internal or external to the business. However, for this unit, evidence collected in a realistic working environment or to a work placement is permissible. Simulation is not allowed for any performance evidence with this unit.
- 2 Learners may collect the evidence for the unit through work in a private sector business, a not-for-profit business or public service business.
- 3 Learners must provide evidence that shows they have done this over a sufficient period of time with different clients on different occasions for the assessor to be confident that they are competent.
- 4 Learners must provide evidence that the additional services or products offered include:
 - Use of services or products that are new to their client
 - Additional use of services or products that their client has used before. Workplace policies

- 5 Their evidence must show that they:
- Follow company procedures for offering additional services or products to their clients
 - Create opportunities for encouraging their clients to use additional services or products
 - Identify what their client wants by seeking information directly
 - Identify what their client wants from spontaneous client comments
- 6 Their communication with clients may be face to face, in writing, by telephone, text message, email, Internet, intranet or by any other method they would be expected to use within their job role.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Identify additional services or products that are available	<p>1.1 Update and develop their knowledge of their organisation's services or products</p> <p>1.2 Check with others when they are unsure about new service or product details</p> <p>1.3 Identify appropriate services or products that may interest their customer</p> <p>1.4 Spot opportunities for offering their customer additional services or products that will improve the customer experience</p>			
2	Inform customers about additional services or products	<p>2.1 Choose the best time to inform their customer about additional services or products</p> <p>2.2 Choose the best method of communication to introduce their customer to additional services or products</p> <p>2.3 Give their customer accurate and sufficient information to enable them to make a decision about the additional services or products</p> <p>2.4 Give their customer time to ask questions about the additional services or products</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Gain customer commitment to using additional services or products	<p>3.1 Close the conversation if the customer shows no interest</p> <p>3.2 Give information to move the situation forward when their customer shows interest</p> <p>3.3 Secure customer agreement and check customer understanding of the delivery of the service or product</p> <p>3.4 Take action to ensure prompt delivery of the additional services or products to their customer</p> <p>3.5 Refer their customer to others or to alternative sources of information if the additional services or products are not their responsibility</p>			
4	Understand how to promote additional services or products to customers	<p>4.1 Describe the organisation's procedures and systems for encouraging the use of additional services or products</p> <p>4.2 Explain how additional services or products will benefit their customers</p> <p>4.3 Explain how their customer's use of additional services or products will benefit their organisation</p> <p>4.4 Identify the main factors that influence customers to use their services or products</p> <p>4.5 Explain how to introduce additional services or products to customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	4.6 State how to give appropriate, balanced information to customers about services or products			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 39: Deal with Incoming Telephone Calls from Customers

Unit reference number: F/601/1223

Level: 2

Credit value: 5

Guided learning hours: 33

Unit summary

Many organisations rely on dealing with incoming telephone calls as a key part of their customer service procedures. Customer expectations are high when calling organisations because they have had an opportunity to prepare for their call. In addition, a proportion of calls start with customers in a negative frame of mind because the caller sees making a call as a way of dealing with a customer service problem. This unit is about being prepared to deal effectively with calls and using effective communication to satisfy customers with the outcome of each call.

Assessment requirements/evidence requirements

Wherever possible the learner's evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner may provide evidence of dealing with customers using land line telephones, mobile telephones, internet telephone connections, video telephone systems or any other technology that involves a conversation with a customer at a distance.

The learner's evidence must include examples of dealing with customers who:

- 1 have standard expectations of the learner's organisation's customer service
- 2 have experienced difficulties when dealing with the learner's organisation
- 3 have made a specific request for information
- 4 need to be informed of circumstances of which they are unaware.

The learner's evidence must include examples of dealings with customers that are:

- 1 planned
- 2 unplanned.

The learner must provide evidence of dealing with customers by telephone:

- 1 during routine delivery of customer service
- 2 during a busy time in their job
- 3 during a quiet time in their job
- 4 when people, systems or resources have let them down.

The learner must provide evidence that they have taken messages that are passed on to colleagues:

- 1 verbally
- 2 in a form that maintains a permanent record.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Use communication systems effectively	1.1	Operate telecommunication equipment efficiently and effectively		
		1.2	Speak clearly and slowly and adapt their speech to meet the individual needs of their customer		
		1.3	Listen carefully when collecting information from their customer		
		1.4	Select the information they need to record and store following their organisation's guidelines		
		1.5	Update their customer records during or after the call to reflect the key points of the conversation		
2	Establish rapport with customers who are calling	2.1	Greet their customer following their organisation's guidelines		
		2.2	Listen closely to their customer to identify their precise reason for calling and what outcome they are seeking from the call		
		2.3	Confirm the identity of their customer following organisational guidelines		
		2.4	Use effective and assertive questions to clarify their customer's requests		
3	Deal effectively with customer questions and requests	3.1	Identify all the options they have for responding to their customer and weigh up the benefits and drawbacks of each		
		3.2	Choose the option that is most likely to lead to customer satisfaction within the service offer		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>3.3 Give clear and concise information to customers in response to questions or requests</p> <p>3.4 Use questions and answers to control the length of the conversation</p> <p>3.5 Keep their customer regularly informed about their actions when accessing information to provide responses or if they are going to be on hold for a period of time</p> <p>3.6 Put their customer on hold and ensure they cannot be heard if they are discussing action with others or calling a colleague</p> <p>3.7 Summarise the outcome of the call and any actions that they or their customer will take as a result</p> <p>3.8 Check before the call is finished that their customer is content that all their questions or requests have been dealt with</p> <p>3.9 Complete any follow up actions agreed during the call</p> <p>3.10 Take a clear message for a colleague if they are unable to deal with some aspect of their customer's questions or requests</p> <p>3.11 Ensure that promises to call back are kept</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Know how to deal with incoming telephone calls from customers	4.1 Describe their organisation's guidelines and procedures for the use of telecommunication equipment			
		4.2 Explain how to operate the organisation's telecommunication equipment			
		4.3 Explain the importance of speaking clearly and slowly when dealing with customers by telephone			
		4.4 Describe the effects of smiling and other facial expressions that can be detected by somebody listening to them on the telephone			
		4.5 Explain the importance of adapting their speech to meet the needs of customers who may find their language or accent difficult to understand			
		4.6 Identify what information is important to note during or after telephone conversations with customers			
		4.7 Describe their organisation's guidelines and procedures for what should be said during telephone conversations with customers			
		4.8 Explain the importance of keeping their customer informed if they are on hold during a call			
		4.9 Explain the importance of not talking across an open line			
		4.10 list details that should be included if taking a message for a colleague			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	4.11 Describe their organisation's guidelines and procedures for taking action to follow up calls made to customers 4.12 Describe their organisation's guidelines for handling abusive calls			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 40: Deal with Customers Using Bespoke Software

Unit reference number: L/601/1225

Level: 2

Credit value: 5

Guided learning hours: 33

Unit summary

Customer service is often delivered using bespoke software when dealing with customers face-to-face, by telephone or online. For the process to be effective, the learner must be able to navigate the system quickly and directly following recommended routes and using all the functionality of the system. Customers are unaware of the details of the system they are using and they must be kept informed of the different steps the learner is taking. The use of the system must also ensure that the learner keeps appropriate records of the transaction so that it can proceed successfully through the next stages. Most of all, customer satisfaction must drive the interaction and it should not appear to be dominated by the demands of the software. This unit is for a learner who is responsible for delivering service to customers at the same time as operating bespoke service software.

Assessment requirements/evidence requirements

Wherever possible the learner's evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner's communication with customers may be face to face, in writing, by telephone, text message, email, internet (including social networking), intranet or by any other method they would be expected to use within their job role.

The learner must provide evidence of dealing with customers using bespoke software:

- 1 during routine delivery of customer service
- 2 during a busy time in their job
- 3 during a quiet time in their job
- 4 when people, systems or resources have let them down.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Prepare to deliver customer service using bespoke software	1.1 Sign on and open access to appropriate functions in the IT system			
		1.2 Navigate the architecture and geography of the customer service site to ensure they can access all appropriate areas			
		1.3 Explore screen or menu routes that are most appropriate for the customer service they are seeking to deliver			
		1.4 Ensure that they are familiar with the software manual, help screens or help lines to know where to locate technical support when needed			
		1.5 Prepare their work area to deliver customer service using bespoke software			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Deliver customer service using bespoke software	2.1 Identify their customer or the services or products they wish to access			
		2.2 Follow organisational procedures to step through the system in a way that responds to their customer's needs			
		2.3 Use search or other specialist functions within the software to respond to customer requests			
		2.4 Enter new records using the bespoke software system			
		2.5 Amend customer service records in the bespoke software system			
		2.6 Communicate with their customers in terms they can understand relating to the software system			
		2.7 Follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software			
		2.8 Interpret error messages and act on them to support their customer service			
		2.9 Refer their customer to a colleague following organisational procedures if they are unable to complete the transaction			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand how to deal with customers using bespoke software	3.1 Describe access and sign-on routines for the bespoke software system			
		3.2 Describe the architecture and geography of the bespoke software system			
		3.3 Identify different screen or menu routes that can be followed to meet customer requirements			
		3.4 Identify sources of support and help for the bespoke software including manuals, help screens and help lines			
		3.5 Explain the importance of preparing a work area before delivering customer service			
		3.6 Explain search or other enquiry facilities within the bespoke software system			
		3.7 State the importance of avoiding jargon and system terminology when communicating with customers			
		3.8 Describe ways to respond to error messages when using a bespoke software system			
		3.9 Identify referral points and sources of information when they are unable to meet customer needs using the bespoke software system			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 41: Maintain Customer Service Through Effective Handover

Unit reference number: Y/601/1227

Level: 2

Credit value: 4

Guided learning hours: 27

Unit summary

Customer service delivery in a team involves many situations when the learner is unable to see actions through and they pass on responsibility to a colleague. This sharing of responsibility should be organised and follow a recognised pattern. Most of all the learner needs to be sure that, when responsibility is passed on, the actions are seen through. This involves routinely checking with their colleagues that customer service actions have been completed. This unit is for a learner whose job involves service delivery as part of a team and who regularly passes on responsibility for completion of a customer service action to a colleague.

Assessment requirements/evidence requirements

Wherever possible the learner's evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner must provide evidence of maintaining customer service through effective hand over:

- 1 during routine delivery of customer service
- 2 during a busy time in their job
- 3 during a quiet time in their job
- 4 when people, systems or resources have let them down.

The learner does not need to be more senior than their colleague or be their supervisor to pass on responsibility to them for customer service actions or check completion.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Agree joint responsibilities in a customer service team	1.1 Identify services or products they are involved in delivering that rely on effective teamwork			
		1.2 Identify steps in the customer service delivery process that rely on exchange of information between them and their colleagues			
		1.3 Agree with colleagues when it is right to pass responsibility for completing a customer service action to another			
		1.4 Agree with colleagues on how information should be exchanged between them to enable another to complete a customer service action			
		1.5 Identify ways of reminding themselves when they have passed responsibility to a colleague for completing a customer service action			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Check that customer service actions are seen through by working together with colleagues	2.1	Access reminders to identify when to check that a customer service action has been completed		
		2.2	Ensure that they are aware of all details of customer service actions their colleague was due to complete		
		2.3	Ask their colleague about the outcome of them completing the customer service action as agreed		
		2.4	Identify the next customer service actions if their colleagues have been unable to complete the actions they had previously agreed		
		2.5	Work with colleagues to review the way in which customer service actions are shared		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand how to maintain customer service through effective handover	3.1 Explain their organisation's customer service procedures for the services or products they are involved in delivering			
		3.2 Identify the appropriate colleagues to pass responsibility to for completing particular customer service actions			
		3.3 Describe ways of ensuring that information is passed between them and their colleagues effectively			
		3.4 Identify ways to remind themselves of actions that need to be checked when they have passed on responsibility to a colleague			
		3.5 Explain the importance of checking tactfully with a colleague whether they have completed the customer service actions they were expecting			
		3.6 Identify opportunities for contributing to review the way customer service actions are shared in customer service processes			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 42: Resolve Customer Service Problems

Unit reference number: M/601/1511

Level: 2

Credit value: 6

Guided learning hours: 40

Unit summary

This unit is about what to do when it is difficult to meet customer expectations. Even if the service the learner gives is excellent, some customers experience problems. Part of the learner's job is to help to resolve those problems. There is likely to be a problem if customer expectations are not met. This may be because the customer's expectations involve more than the learner can offer or because service procedures have not been followed. Some problems are reported by customers and sometimes the learner will spot the problem first and resolve it before their customer has even noticed. As soon as the learner is aware of a problem, they need to consider the options and then choose a way to put it right. This unit is particularly important in customer service because many customers judge how good the customer service of the organisation is by the way problems are handled.

Assessment requirements/evidence requirements

The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner's evidence must include examples of resolving problems involving each of the following:

- 1 a problem first identified by customers
- 2 a problem identified within the organisation before it has affected the learner's customer
- 3 a problem caused by differences between their customer's expectations and what their organisation can offer

- 4 a problem caused by a system or procedure failure
- 5 a problem caused by a lack of resources or human error.

The learner must provide evidence that they:

- 1 supplied relevant information when customers have requested it
- 2 supplied relevant information when customers have not requested it
- 3 have used agreed organisational procedures when solving problems
- 4 have made exceptions to usual practice with the agreement of others.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Spot customer service problems	1.1 Listen carefully to customers about any problem they have raised			
		1.2 Ask customers about the problem to check their understanding			
		1.3 Recognise repeated problems and alert the appropriate authority			
		1.4 Share customer feedback with others to identify potential problems before they happen			
		1.5 Identify problems with systems and procedures before they begin to affect customers			
2	Pick the best solution to resolve customer service problems	2.1 Identify the options for resolving a customer service problem			
		2.2 Work with others to identify and confirm the options to resolve a customer service problem			
		2.3 Work out the advantages and disadvantages of each option for their customer and the organisation			
		2.4 Pick the best option for their customer and the organisation			
		2.5 Identify for their customer other ways that problems may be resolved if they are unable to help			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Take action to resolve customer service problems	3.1			
		3.2			
		3.3			
		3.4			
		3.5			
		3.6			
4	Know how to resolve customer service problems	4.1			
		4.2			
		4.3			
		4.4			
		4.5			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 43: Process Information About Customers

Unit reference number: H/601/1215

Level: 2

Credit value: 5

Guided learning hours: 33

Unit summary

The learner and their organisation need information about their customers and their behaviour to answer customer questions and to respond to customer requests. Information about customers is also used by the organisation to develop its customer service. Some customer information is collected from customers. Other customer information is collected through information systems and equipment that make records of service delivery. In either case the learner must collect information, retrieve it and supply it when needed. Good customer information provides a sound basis for all customer service transactions. The quality of the customer information depends heavily on the skills and attention to detail of the person dealing with the information.

Assessment requirements/evidence requirements

Wherever possible the learner's evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner's communication with customers may be face to face, in writing, by telephone, text message, email, internet (including social networking), intranet or by any other method they would be expected to use within their job role.

The learner must provide evidence that they have processed information relating to:

- 1 new customers
- 2 existing customers.

The learner's evidence must show that they have:

- 1 checked whether the information they are collecting and retrieving is accurate and up-to-date
- 2 selected information that is directly relevant to each of their customers.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Collect information about customers	1.1 Collect and record new information about customers following the organisation's guidelines			
		1.2 Update existing information about customers			
		1.3 Record and store information about customers that is accurate, sufficient and relevant following organisational guidelines			
2	Select and retrieve information about customers	2.1 Respond promptly to authorised requests for information about customers			
		2.2 Select and retrieve relevant information for customers or colleagues following the organisation's guidelines			
3	Supply information about customers	3.1 Supply accurate and sufficient information about customers to meet their customers' or colleagues' expectations			
		3.2 Choose the most appropriate way to supply information to their customers or colleagues			
		3.3 Confirm that their customers or colleagues have received and understood the customer information			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Understand how to process customer service information	4.1 Describe their organisation's procedures and guidelines for collecting, retrieving and supplying information about customers			
		4.2 Identify types of personal information about customers that should and should not be kept on record			
		4.3 Explain how to collect information about customers efficiently and effectively			
		4.4 Explain how to operate the customer information storage system			
		4.5 Explain why processing information about customers correctly makes an important contribution to effective customer service			
		4.6 Explain the importance of attention to detail when processing information about customers			
		4.7 Describe legal and regulatory restrictions on the storage and use of customer data			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 44: Deliver Customer Service to Difficult Customers

Unit reference number: T/601/1512

Level: 2

Credit value: 6

Guided learning hours: 40

Unit summary

Many organisations have a significant proportion of difficult customers. The customer's attitude may be difficult simply because they believe that a threat or problem exists before they contact the organisation. They may become difficult or even aggressive when they discover that their expectations are not going to be met by the organisation. They may be very concerned or nervous about the outcome of dealing with the organisation. In either case, they are difficult to deal with and need the learner's understanding. This unit is about dealing directly with these customers and trying to reach a resolution that satisfies everybody or at least reduces the risk of dissatisfaction. The learner should choose this unit only if they recognise the content as applying to a reasonable proportion of their exchanges with customers. Do not choose this unit if it will be hard to find evidence because the learner only occasionally deals with a difficult customer.

Assessment requirements/evidence requirements

The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner must provide evidence of delivering customer service to difficult customers:

- 1 during routine delivery of customer service
- 2 during a busy time in their job
- 3 during a quiet time in their job
- 4 when people, systems or resources have let them down.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Recognise when customers may be difficult to deal with	1.1	Recognise types of customer behaviour that are difficult to deal with		
		1.2	Identify aspects of their organisation's services or products that make it difficult to deal with customers		
		1.3	Identify the signs and signals that indicate a customer may be difficult to deal with		
		1.4	Put themselves in their customer's position and see the situation from the customer's point of view		
		1.5	Identify reasons why their customers may be behaving in a way that is difficult to deal with		
		1.6	Recognise the limits of difficult customer behaviour that their organisation will tolerate		
		1.7	Identify things that they may do or say that will provoke difficult responses from their customer		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Deal with difficult customers	2.1	Listen patiently to what their customer wants to tell them		
		2.2	Use direct and factual questions about their customer's feelings and what has happened to identify what might satisfy the customer		
		2.3	Check their understanding of their customer's concerns by describing their view of the situation and options that might be available		
		2.4	Express empathy with their customer without necessarily admitting fault on the part of their organisation		
		2.5	Give clear statements or explanations of their organisation's position		
		2.6	Agree a way forward that balances customer satisfaction with the needs of their organisation		
		2.7	Enlist help from colleagues if options for action are outside of their authority		
		2.8	Summarise clearly actions to be taken and reasons for those actions to complete the customer transaction		
		2.9	Advise their manager or the appropriate colleagues if the customer is likely to re-open the matter with them		
		2.10	Take any necessary action to protect their own safety or that of other customers or colleagues from a difficult customer		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand how to deliver customer service to difficult customers	3.1 Describe the types of customer behaviour that they personally find difficult to deal with			
		3.2 Identify reasons why some aspect of their organisation's services or products may provoke difficult behaviour from customers			
		3.3 Identify reasons why their customer's own actions may cause them to behave in a way that is difficult to deal with			
		3.4 Explain the meaning of having empathy for a customer's feelings			
		3.5 Identify who can be asked for help when dealing with a difficult customer			
		3.6 Explain the difference between assertive, aggressive and passive behaviour			
		3.7 Describe the importance of not simply quoting their organisation's rules and procedures to counter their customer's difficult behaviour			
		3.8 State their organisation's limits of what will be tolerated from difficult customers before the transaction or relationship is closed			
		3.9 Explain the importance of giving their manager or the appropriate colleagues notice of any further approaches from a difficult customer			
		3.10 Identify when it might be necessary to take action to protect their own safety or that of other customers or colleagues from a difficult customer			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 45: Buddy a Colleague to Develop their Customer Service Skills

Unit reference number: M/601/1542

Level: 2

Credit value: 5

Guided learning hours: 33

Unit summary

In customer service roles it is often useful to have a 'buddy' relationship with somebody who has more experience of the same customer service situation. If someone is asked to buddy a colleague who is learning customer service aspects of their job, they will need to approach that responsibility in an organised way. This unit is about how to be a good buddy by working alongside their colleague and providing them with constructive feedback and support. Someone does not need to be more senior than their colleague or their supervisor to act as a customer service buddy.

Assessment requirements/evidence requirements

The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner must provide evidence of buddying a colleague to develop their customer service skills:

- 1 during routine delivery of customer service
- 2 during a busy time in their job
- 3 during a quiet time in their job
- 4 when people, systems or resources have let them down.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Plan and prepare to buddy a colleague	1.1 Agree with their colleague aspects of the colleague's work which may benefit most from their buddying support			
		1.2 Confirm their understanding of their colleague's job tasks and responsibilities using reliable sources			
		1.3 Clarify the customer service image and impression their colleague should present in their job			
		1.4 Arrange times when it will be most helpful to work alongside their colleague			
		1.5 Plan details of a buddy session to support their colleague on the job			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Support their buddy colleague on the job	2.1 Agree with their colleague where they will be placed near them when buddying them on the job			
		2.2 Ensure their presence when their buddy is dealing with customers does not detract from effective customer service			
		2.3 Carry out customer service tasks in the presence of their buddy colleague to set an example the colleague can follow			
		2.4 Observe their colleague closely to identify what they do well and areas in which they could improve			
		2.5 Discuss each customer transaction briefly when there is time available between dealing with customers to identify approaches that work well and areas for improvement			
		2.6 Praise their colleague on aspects of work which they have carried out well			
		2.7 Explain to their colleague ways in which they can improve their customer service performance			
		2.8. Make notes on their colleague's strengths and areas for development that they can discuss with their colleague			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Provide buddy support off the job	3.1	Arrange suitable times to meet with their buddy colleague when they are not directly engaged with customers		
		3.2	Identify areas of general interest that help to establish rapport with their buddy colleague		
		3.3	Use notes made when observing their colleague to discuss positive and negative aspects of their colleague's performance		
		3.4	Agree actions their buddy colleague can take to improve their customer service performance		
		3.5	Offer hints and tips on effective customer service actions to their buddy colleague drawn from their own experience		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Understand how to buddy a colleague to develop their customer service skills	4.1	identify the tasks in their buddy colleague's job		
		4.2	identify areas of the job that benefit most from buddying support		
		4.3	describe the customer service image and impression that should be presented in their buddy colleague's job		
		4.4	identify the best times at which to work alongside their buddy colleague		
		4.5	identify ways to work alongside their buddy colleague without intruding on the customer relationship		
		4.6	describe techniques for giving positive feedback and constructive criticism to their buddy colleague		
		4.7	explain the importance of establishing an effective rapport with their buddy colleague		
		4.8	review options for actions their buddy colleague can take to improve their customer service performance		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 46: Give Customers a Positive Impression of Yourself and your Organisation

Unit reference number: L/601/0933

Level: 2

Credit value: 5

Guided learning hours: 33

Unit summary

Excellent customer service is provided by people who are good with people. The learner's behaviour affects the impression that customers have of the service they are receiving. This unit is about communicating with the customers and giving a positive impression whenever dealing with a customer. By doing this the learner can create a positive impression of the organisation and the customer service it provides. All of us enjoy the experience of good customer service if we feel that the person serving us really wants to create the right impression, responds to us and gives us good information. Every detail of the learner's behaviour counts when dealing with a customer.

Assessment requirements/evidence requirements

Wherever possible the learner's evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner's communication with customers may be face to face, in writing, by telephone, text message, email, internet (including social networking), intranet or by any other method they would be expected to use within their job role.

The learner must provide evidence of creating a positive impression with customers:

- 1 during routine delivery of customer service
- 2 during a busy time in their job
- 3 during a quiet time in their job
- 4 when people, systems or resources have let them down.

The learner must provide evidence that they communicate with customers effectively by:

- 1 using appropriate spoken or written language
- 2 applying the conventions and rules appropriate to the method of communication they have chosen.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Establish rapport with customers	1.1 Meet their organisation's standards of appearance and behaviour 1.2 Greet their customer respectfully and in a friendly manner 1.3 Communicate with their customer in a way that makes them feel valued and respected 1.4 Identify and confirm their customer's expectations 1.5 Treat their customer courteously and helpfully at all times 1.6 Keep their customer informed and reassured 1.7 Adapt their behaviour to respond to different customer behaviour			
2	Respond appropriately to customers	2.1 Respond promptly to a customer seeking help 2.2 Choose the most appropriate way to communicate with their customer 2.3 Check with their customer that they have fully understood their expectations 2.4 Respond promptly and positively to their customer's questions and comments 2.5 Allow their customer time to consider their response and give further explanation when appropriate			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Communicate information to customers	3.1 Quickly find information that will help their customer			
		3.2 Give their customer information they need about the services or products offered by their organisation			
		3.3 Recognise information that their customer might find complicated and check whether they fully understand			
		3.4 Explain clearly to their customers any reasons why their expectations cannot be met			
4	Understand how to give customers a positive impression of themselves and the organisation	4.1 Describe their organisation's standards for appearance and behaviour			
		4.2 Explain their organisation's guidelines for how to recognise what their customer wants and respond appropriately			
		4.3 Identify their organisation's rules and procedures regarding the methods of communication they use			
		4.4 Explain how to recognise when a customer is angry or confused			
		4.5 Identify their organisation's standards for timeliness in responding to customer questions and requests for information			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 47: Support Customers Using Online Customer Services

Unit reference number: H/601/1540

Level: 2

Credit value: 5

Guided learning hours: 33

Unit summary

Many organisations develop their customer service by directing customers towards online services. Customer service delivered online leaves a customer isolated and reliant on screen routes and instructions. A customer may seek help face to face or by telephone. That help will involve the learner in understanding what the customer is trying to achieve, how the system allows for that and what point they have reached in terms of finding the right route. Difficulties can arise if the system fails or if the learner's customer is unable to discover how it can deliver what they want. This unit is for the learner if one part of their job involves helping customers to find their way through online systems.

Assessment requirements/evidence requirements

The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner must provide evidence of supporting customers who are:

- 1 new to the use of online services for this particular purpose
- 2 familiar with the use of online services for this particular purpose.

The learner's evidence must include examples of helping customers with difficulties caused by:

- 1 the customer's use of the online services
- 2 a system or equipment failure.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Establish the type and level of support their customer needs to achieve online customer service	<p>1.1 Ensure that they are up-to-date with the online services that their customers use</p> <p>1.2 Identify what the customer is trying to achieve and what they are having difficulties with</p> <p>1.3 Question their customer to discover the customer's degree of familiarity with the system</p> <p>1.4 Offer their customer the option of trying the online approach once more</p> <p>1.5 Agree with their customer the exact nature of the problem and steps that may be taken to overcome it</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Support online customer service in conversation with their customer	2.1	Explore the online customer system in order to develop their own knowledge and skills in its use		
		2.2	Step through the screen sequence with their customer whilst allowing them to operate the system for themselves		
		2.3	Address their customer in an understanding and supportive manner		
		2.4	Explain to their customer why certain steps are required in the process		
		2.5	Offer the options to their customer of stepping them through the process or completing the transaction themselves		
		2.6	Promote access to additional services or products when supporting customers online		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand how to support customers using online services	3.1	Explain how their organisation's system for online service delivery works		
		3.2	Describe the importance of close active listening to discover what their customer is trying to achieve		
		3.3	Identify ways to communicate clearly with customers who have different levels of skills and understanding of the online system		
		3.4	Explain why it is generally preferable for their customer to complete a transaction for themselves		
		3.5	Explain the importance of building customer confidence in using the online system by supporting and encouraging		
		3.6	Compare the benefits and drawbacks of talking a customer through use of the system or completing the transaction themselves		
		3.7	Identify additional services or products that may be promoted to online customers		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 48: Follow the Rules to Deliver Customer Service

Unit reference number: L/601/1614

Level: 2

Credit value: 4

Guided learning hours: 30

Unit summary

This unit requires the learner to show that they know and understand all the rules that apply to customer service delivered by their organisation and how they apply to the learner and their job.

Assessment requirements/evidence requirements

Wherever possible the learner's evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The 'organisation' from which the learner draws their evidence must be the organisation they work for or the organisation in which they have realistic work experience. The 'organisation' may be the whole of the organisation or the business unit, division or department with which they are involved.

The learner must provide evidence of following the rules to deliver customer service:

- during routine delivery of customer service
- during a busy time in their job
- during a quiet time in their job
- when people, systems or resources have let them down.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Follow their organisation's customer service practices and procedures	<p>1.1 Follow organisational practices and procedures that relate to their customer service work</p> <p>1.2 Recognise the limits of what they are allowed to do when delivering customer service</p> <p>1.3 Refer to somebody in authority when they need to</p> <p>1.4 Work in a way that protects the security of customers and their property</p> <p>1.5 Work in a way that protects the security of information about customers</p>			
2	Know how to follow the rules to deliver customer service	<p>2.1 Describe organisational practices and procedures that relate to their customer service work</p> <p>2.2 Identify the limits of what they are allowed to do when delivering customer service</p> <p>2.3 Explain when and how they should refer to somebody in authority about the rules for delivering customer service</p> <p>2.4 Explain how they protect the security of customers and their property</p> <p>2.5 Explain how they protect the security of information about customers</p> <p>2.6 Describe their health and safety responsibilities as they relate to their customer service work</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.7 Explain their responsibilities to deliver customer service treating customers equally 2.8. Explain why it is important to respect customer and organisation confidentiality 2.9 List the main things they must do and not do in their job under legislation that affects their customer service work 2.10 List the main things that they must do and not do in their job under external regulations that affect their customer service work			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 49: Process Customer Service Complaints

Unit reference number: D/601/1522

Level: 3

Credit value: 6

Guided learning hours: 40

Unit summary

This unit is about the process of handling complaints. In any customer service situation a customer who is not satisfied may resort to making a complaint. Complaints may be justified or unjustified but in either case the learner's customer expects them to respond and to offer some resolution or compensation. Complaints require investigation and the different options for their resolution to be considered. The learner's organisation may have detailed and formal procedures for dealing with complaints.

Assessment requirements/evidence requirements

The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this unit. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner must provide evidence that they have processed complaints that are seen by their organisation as:

- 1 justified
- 2 unjustified.

The learner must provide evidence of processing customer service complaints:

- 1 during routine delivery of customer service
- 2 during a busy time in their job
- 3 during a quiet time in their job
- 4 when people, systems or resources have let them down.

The learner needs to provide evidence that they have dealt with customers who:

- 1 have different needs and expectations
- 2 appear angry or confused
- 3 behave unusually.

The learner must provide evidence that they have processed complaints and taken full account of:

- 1 organisational procedures
- 2 sector or industry codes of practice
- 3 legislation.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Recognise the signs that a query or problem is about to produce a complaint	1.1 Identify signs that a customer is becoming dissatisfied with the customer service of their organisation			
		1.2 Take action to change the situation so that the query or problem does not result in a complaint			
		1.3 Take actions to change their customer service approach in order to avoid future complaints when a justified complaint has been made			

<p>2 Deal with a complaint effectively</p>	<p>2.1 Ensure that they have a clear understanding of the nature and details of the complaint</p> <p>2.2 Investigate the facts of the complaint in order to establish whether it should be dealt with as a justified complaint or an unjustified complaint</p> <p>2.3 Identify all the possible options for a solution and consider the benefits and drawbacks of each option for their customer and for their organisation</p> <p>2.4 Assess the risks to their organisation of choosing each option</p> <p>2.5 Report the findings of their investigation to their customer and offer their chosen solution</p> <p>2.6 Escalate the complaint by involving more senior members of their organisation or an independent third party if there is sufficient reason to do so</p> <p>2.7 Give feedback to other colleagues involved which will help them avoid future complaints</p> <p>2.8 Keep clear records of the way the complaint has been handled to avoid later misunderstandings</p>			
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Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand how to process customer service complaints	3.1 Explain how to monitor the level of complaints and identify those that should provoke a special review of the service offer and service delivery			
		3.2 Explain why dealing with complaints is an inevitable part of delivering customer service			
		3.3 Describe organisational procedures for dealing with complaints			
		3.4 Explain how to negotiate a solution with their customer that is acceptable to that customer and to the organisation			
		3.5 Explain the regulatory definition of a complaint in their sector and the regulatory requirements of how complaints should be handled and reported			
		3.6 Explain when to escalate a complaint by involving more senior members of the organisation or an independent third party			
		3.7 Explain the cost and regulatory implications of admitting liability for an error made by their organisation			
		3.8 Identify how to spot and interpret signals that their customer may be considering making a complaint			
		3.9 Describe techniques for handling conflict			
		3.10 Explain the importance of dealing with a complaint promptly			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.11 Explain why the offer of compensation or replacement service or products may not always be the best options for resolving a complaint 3.12 Explain how the successful handling of a complaint presents an opportunity to impress a customer who has been dissatisfied			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 50: Work with Others to Improve Customer Service

Unit reference number: D/601/1553

Level: 3

Credit value: 8

Guided learning hours: 53

Unit summary

Teamwork is a key component of delivering and improving excellent customer service. The people the learner works with to improve customer service may include one or more of the following: team members; colleagues; suppliers; service partners; supervisors; managers; team leaders. The delivery of excellent customer service depends on their skills and those of others. It involves communicating with each other and agreeing how they can work together to give a more effective service. They all need to work together positively. The learner must also monitor their own and the team's performance and change the way they do things if that improves customer service. This unit is about how the learner develops a relationship with others to improve their customer service performance.

Assessment requirements/evidence requirements

The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this unit. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner's evidence must include examples of agreeing customer service roles and responsibilities which are:

- 1 part of their own role
- 2 part of other people's roles.

The learner must provide evidence that they have worked with two of these groups of people:

- 1 team members or colleagues
- 2 suppliers or service partners
- 3 supervisors, team leaders or managers.

The learner's evidence must show that their work with others involves communication by two of these methods as expected within their job role:

- 1 face to face
- 2 in writing
- 3 by telephone
- 4 using text messages
- 5 by email
- 6 using the internet (including social networking)
- 7 using an intranet.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Improve customer service by working with others	1.1	Contribute constructive ideas for improving customer service		
		1.2	Identify what they have to do to improve customer service and confirm this with others		
		1.3	Agree with others what they have to do to improve customer service		
		1.4	Co-operate with others to improve customer service		
		1.5	Keep their commitments made to others		
		1.6	Make others aware of anything that may affect plans to improve customer service		
2	Monitor their own performance when improving customer service	2.1	Discuss with others how what they do affects customer service performance		
		2.2	Identify how the way they work with others contributes towards improving customer service		
3	Monitor team performance when improving customer service	3.1	Discuss with others how teamwork affects customer service performance		
		3.2	Work with others to collect information on team customer service performance		
		3.3	Identify with others how customer service teamwork could be improved		
		3.4	Take action with others to improve customer service performance		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Understand how to work with others to improve customer service	4.1 Describe who else is involved either directly or indirectly in the delivery of customer service			
		4.2 Describe the roles and responsibilities of others in their organisation			
		4.3 Describe the roles of others outside their organisation who have an impact on their services or products			
		4.4 Evaluate what the goals or targets of their organisation are in relation to customer service and how these are set			
		4.5 Evaluate how their organisation identifies improvements in customer service			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 51: Monitor Health and Safety Procedures in a Contact Centre

Unit reference number: M/503/0355

Level: 3

Credit value: 5

Guided learning hours: 20

Unit summary

This unit concerns being able to assess health and safety risks in a contact centre, monitor compliance with health and safety procedures, provide guidance on health and safety matters and understand the principles underpinning health and safety in their area of work in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to assess health and safety risks in a contact centre	1.1 Identify the work areas that are subject to a risk assessment 1.2 Follow organisational procedures for assessing risk 1.3 Schedule health and safety risk assessments and audits 1.4 Establish the consequences of identified risks 1.5 Make recommendations for action that address the identified risks			
2	Be able to monitor compliance with health and safety procedures in a contact centre	2.1 Identify the health and safety procedures relevant to the job role 2.2 Use a compliance plan that addresses identified risks and is capable of identifying new risks 2.3 Carry out routine checks in accordance with the compliance plan 2.4 Communicate the findings of health and safety risk assessments and compliance monitoring to those who need to know			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to provide guidance on health and safety matters in a contact centre	<p>3.1 Identify the individuals who need information and advice on health and safety matters</p> <p>3.2 Identify the requirements in health and safety procedures that are specific to contact centre job roles</p> <p>3.3 Communicate information and advice on health and safety matters by the method that is appropriate for different contact centre job roles</p>			
4	Understand the principles underpinning health and safety in their area of work in a contact centre	<p>4.1 Explain the health and safety regulations and legislation that are relevant to their area of work in the contact centre</p> <p>4.2 Explain how to identify activities in the contact centre that require a risk assessment</p> <p>4.3 Explain organisational procedures for health and safety risk assessment in the contact centre</p> <p>4.4 Explain different options for action to mitigate health and safety risks in the contact centre</p> <p>4.5 Explain the advantages and disadvantages of different ways of communicating findings and recommendations on risk assessments</p> <p>4.6 Explain how the findings of health and safety risk assessments fit within general health and safety audits</p>			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 52: Support Team Use of Contact Centre Systems and Technology

Unit reference number: R/503/0364

Level: 3

Credit value: 6

Guided learning hours: 20

Unit summary

This unit concerns being able to provide guidance to colleagues on contact centre systems and technology, produce new reports, adjust system parameters to optimise performance, report on potential system enhancements and understand use of systems and technology to support contact centre operations.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to provide guidance to colleagues on contact centre systems and technology	<p>1.1 Provide advice and guidance in the use of technological functionality that enables optimum efficiency</p> <p>1.2 Deliver coaching/buddying activities for colleagues in accordance with their development plans</p>			
2	Be able to produce new reports in a contact centre	<p>2.1 Identify contact metrics to be included in reports that are capable of contributing to organisational understanding of contact patterns</p> <p>2.2 Produce new reports that meet the agreed requirements</p> <p>2.3 Manipulate data according to organisational guidelines to make the most effective presentation of reports</p>			
3	Be able to adjust system parameters to optimise performance in a contact centre	<p>3.1 Predict the effects of alterations to applications and systems according to organisational policy and practices</p> <p>3.2 Change routing rules to adjust contact priorities that meet resource availability and customer expectations</p> <p>3.3 Identify data flow changes resulting from system updates</p> <p>3.4 Evaluate the benefits and drawbacks of changes to different routing parameters</p> <p>3.5 Manage predictive contact queuing efficiently</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Be able to report on potential system enhancements in a contact centre	4.1 Identify areas where a system may benefit from modification			
		4.2 Evaluate the potential benefits from system modifications against the resource cost of implementation			
		4.3 Present findings and recommendations in accordance with organisational procedures			
5	Understand the use of systems and technology to support contact centre operations	5.1 Describe the products and/or services offered or supported by the contact centre			
		5.2 Explain the regulations or legislation that have an impact on contact centre operations			
		5.3 Explain the organisational procedures and guidelines for contact centre operations			
		5.4 Explain the organisational procedures and guidelines for the configuration of system parameters			
		5.5 Explain the advantages and disadvantages of routing rule options			
		5.6 Explain the importance of predictive contact queuing to manage contact distribution			

Learner name: _____

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Learner signature: _____

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Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 53: Supervise Customer Service Activities in a Contact Centre Team

Unit reference number: T/503/0387

Level: 3

Credit value: 4

Guided learning hours: 8

Unit summary

This unit concerns being able to resolve difficulties in customer service in a contact centre, monitor customer service performance and compliance with contact centre organisational and regulatory requirements and understand customer service activities in contact centres.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to resolve difficulties in customer service in a contact centre	<p>1.1 Resolve difficulties relating to customer identification and validation within the level of authority in accordance with organisational procedures</p> <p>1.2 Resolve customer concerns referred from colleagues in accordance with organisational procedures</p> <p>1.3 Provide advice to colleagues in customer service delivery in accordance with organisational procedures</p> <p>1.4 Report customer issues that might impact on customer service delivery in accordance with organisational procedures</p>			
2	Be able to monitor customer service performance and compliance with contact centre organisational and regulatory requirements	<p>2.1 Identify customer issues that might impact on customer service delivery</p> <p>2.2 Test the quality of customer service delivery through monitoring performance against agreed Key Performance Indicators (KPIs)</p> <p>2.3 Validate monitoring data of customer service performance against other evidence</p> <p>2.4 Identify areas for enhancement in customer service from an analysis of monitoring data</p> <p>2.5 Inform colleagues of monitoring results in accordance with organisational procedures</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand customer service activities in contact centres	3.1	Explain the features and benefits of the products and/or services offered or supported by the contact centre		
		3.2	Explain organisational and regulatory requirements of customer service delivery in the contact centre		
		3.3	Describe the organisation's customer service aims and objectives and the service offer of the contact centre		
		3.4	Explain the importance of supporting colleagues by dealing with customer queries and issues that are outside their authority		
		3.5	Explain how to design key performance indicators (KPIs)		

Learner name: _____

Date: _____

Learner signature: _____

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Internal verifier signature: _____

Date: _____

(if sampled)

Unit 54: Manage Customer Service Delivery in a Contact Centre

Unit reference number: A/503/0388

Level: 4

Credit value: 6

Guided learning hours: 10

Unit summary

This unit concerns being able to manage escalation processes for difficult customer service issues in a contact centre, manage the monitoring of customer service performance and feedback, review organisational and regulatory requirements for customer service delivery and understand the management of customer service in contact centres.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to manage escalation processes for difficult customer service issues in a contact centre	<p>1.1 Agree authority boundaries for staff at all levels who deal with customer issues or complaints</p> <p>1.2 Resolve customer issues or complaints referred from colleagues (including high risk or high profile customers) in accordance with organisational procedures</p> <p>1.3 Identify practicable ways of preventing recurrences of customer service issues</p>			
2	Be able to manage the monitoring of customer service performance and feedback in a contact centre	<p>2.1 Design Key Performance Indicators (KPIs) that are capable of measuring customer service performance</p> <p>2.2 Gain approval to KPIs</p> <p>2.3 Coordinate monitoring activities to test the quality of customer service against agreed KPIs</p> <p>2.4 Analyse the results of monitoring data about customer service against organisational and regulatory requirements</p> <p>2.5 Develop enhancements to monitoring procedures for customer service performance</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to review organisational and regulatory requirements for customer service delivery in a contact centre	3.1 Evaluate the impact of existing organisational and regulatory requirements on customer service delivery in the contact centre			
		3.2 Recommend enhancements to organisational strategies and policies to meet regulatory requirements in customer service delivery			
		3.3 Communicate changes in organisational customer service procedures that meet regulatory requirements			
4	Understand the management of customer service in contact centres	4.1 Evaluate the implications for customer service of the organisation's products and/or services offered or supported by the contact centre			
		4.2 Explain organisational and regulatory requirements of customer service delivery in the contact centre			
		4.3 Evaluate the impact of the organisation's customer service aims and objectives on the service offer of the contact centre			
		4.4 Explain how a customer or problem may become high risk or high profile			
		4.5 Explain the importance of supporting team leaders and managers in reinforcing the escalation and complaints procedures			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 55: Carry out Direct Sales Activities in a Contact Centre

Unit reference number: L/503/0394

Level: 2

Credit value: 5

Guided learning hours: 15

Unit summary

This unit concerns being able to gather information needed for direct sales activities in a contact centre, carry out direct sales to customers, keep direct sales records, comply with regulations and legislation during direct sales and understand how to conduct sales activities in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to gather information needed for direct sales activities in a contact centre	1.1 Assemble information about products and/or services that support direct sales 1.2 Obtain from customers sufficient information to support direct sales activities 1.3 Create sales opportunities by making links between information provided by customers and products and/or services 1.4 Find potential new customers for products and/or services			
2	Be able to carry out direct sales to customers through a contact centre	2.1 Establish customers' identity in accordance with organisational procedures 2.2 Check customers' wishes and needs 2.3 Identify possible matches with products and/or services from information provided by customers 2.4 Explain to customers the features and benefits of products and/or services for sale 2.5 Adapt their sales approach and style to meet customer preferences 2.6 Maximise opportunities for cross-selling and up-selling 2.7 Complete the authorisation or payment in accordance with organisational procedures			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to keep direct sales records within a contact centre	3.1 Identify the information about customers, products and/or services that should be recorded during the sales process			
		3.2 Record customer, product and/or service information in accordance with organisational procedures			
4	Be able to comply with regulations and legislation during direct sales in a contact centre	4.1 Identify the regulatory requirements that have an impact on direct sales activities through a contact centre			
		4.2 Ensure compliance with regulations during direct selling through a contact centre			
5	Understand how to conduct sales activities in a contact centre	5.1 Describe the features and benefits of the products and/or services offered or supported by the contact centre			
		5.2 Describe the organisational policies and procedures for direct sales through a contact centre			
		5.3 Describe the organisational requirements and regulation or legislation that have an impact on direct sales activities			
		5.4 Describe the common objections and questions raised by customers during direct selling			
		5.5 Explain how to identify cross-selling and up-selling opportunities			
		5.6 Describe different methods of researching potential new customers			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	5.7 Explain how to retrieve information from organisational sales records 5.8 Describe the organisational procedures for ensuring compliance with relevant regulation and legislation that have an impact on direct selling			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 56: Lead Direct Sales Activities in a Contact Centre Team

Unit reference number: D/503/0397

Level: 3

Credit value: 4

Guided learning hours: 8

Unit summary

This unit concerns being able to carry out sales activities in a contact centre, analyse contact centre sales data, lead a team involved in direct sales activities and understand sales activities in a contact centre team.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to carry out sales activities in a contact centre	1.1 Prepare for a direct sales activity in accordance with organisational procedures			
		1.2 Establish customer wishes and needs			
		1.3 Offer options to customers by linking their wishes and needs to products and/or services			
		1.4 Adapt their sales style and techniques to mirror customer wishes and behaviour			
		1.5 Close the sale by agreement with the customer during the customer contact			
		1.6 Record the confirmed order in accordance with organisational procedures			
		1.7 Ensure compliance with relevant regulation and legislation that has an impact on direct sales through a contact centre			
		1.8 Complete the authorisation or payment in accordance with organisational procedures			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Be able to analyse contact centre sales data	2.1 Collate sales data from direct sales activities in a format that enables data manipulation			
		2.2 Analyse sales performance against market and customer trends			
		2.3 Summarise the results of the sales analysis to enable the formulation of a sales plan			
3	Be able to lead a team involved in direct sales activities in a contact centre	3.1 Identify sales activities which are capable of fulfilling the sales plan			
		3.2 Agree realistic and achievable team sales targets including cross-selling and up-selling			
		3.3 Monitor the team's sales performance against agreed targets			
		3.4 Identify opportunities for improving sales performance through a review of contact centre team sales performance and approach			
		3.5 Provide encouragement and guidance to team colleagues during sales activities			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Understand sales activities in a contact centre team	4.1 Explain the features and benefits of the products and/or services offered or supported by the contact centre			
		4.2 Explain the organisational and regulatory requirements of direct sales activities			
		4.3 Explain the techniques for overcoming objections and questions from customers during sales activities			
		4.4 Explain the importance of adapting their style and approach to mirror customers' style and perspective			
		4.5 Explain the importance of setting a good example in a contact centre team			
		4.6 Explain how to set sales targets including cross-selling and up-selling			

Learner name: _____

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Date: _____

(if sampled)

Unit 57: Manage Direct Sales Activities in a Contact Centre

Unit reference number: H/503/0398

Level: 4

Credit value: 6

Guided learning hours: 12

Unit summary

This unit concerns being able to review the use of sales information and sales techniques in a contact centre, develop plans for direct sales, develop individual and team sales performance and understand the management of sales activities in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to review the use of sales information and sales techniques in a contact centre	<p>1.1 Organise spot checks of how sales information is gathered and sales techniques are used in accordance with organisational guidelines</p> <p>1.2 Collate the results of sales monitoring processes to enable analysis</p> <p>1.3 Identify possible enhancements to customer information collection and/or sales techniques</p>			
2	Be able to develop plans for direct sales in a contact centre	<p>2.1 Identify sales patterns and trends from an analysis of sales data</p> <p>2.2 Identify areas for enhancement in sales activities from an analysis of sales data</p> <p>2.3 Report the findings of the analysis to colleagues in the agreed format</p> <p>2.4 Identify actions to be undertaken including allocating roles and responsibilities</p> <p>2.5 Implement the agreed plans to enhance sales performance in accordance with organisational procedures</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to develop individual and team sales performance in a contact centre	3.1 Identify collective skills needs for direct sales from an analysis of sales data			
		3.2 Identify team members' existing skills and knowledge from an analysis of sales data			
		3.3 Identify team members' development needs from an analysis of sales data			
		3.4 Agree personal and team development plans that are commensurate with the analysis			
		3.5 Implement the agreed actions in accordance with the team and individual development plans			
4	Understand the management of sales activities in a contact centre	4.1 Evaluate the impact of regulations and legislation on the management of sales activities through contact centres			
		4.2 Evaluate the components of a sales plan against agreed criteria			
		4.3 Explain how to create and implement team and individual development plans for sales skills in a contact centre			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

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(if sampled)

Unit 58: **Communicate Information to Customers Through a Contact Centre**

Unit reference number: K/503/0404

Level: 3

Credit value: 4

Guided learning hours: 8

Unit summary

This unit concerns being able to communicate verbally and in writing with customers referred by others in a contact centre, monitor compliance with organisational communications guidelines and understand the principles of communication with customers in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to communicate verbally with customers referred by others in a contact centre	<p>1.1 Deal verbally with queries directly with customers and referred by others following organisational guidelines</p> <p>1.2 Adapt the use of language to meet customers' understanding and needs</p> <p>1.3 Ensure the needs of the organisation and customer are balanced in verbal communications with customers</p>			
2	Be able to communicate in writing with customers referred by others in a contact centre	<p>2.1 Deal with queries in writing directly with customers and referred by others following organisational guidelines</p> <p>2.2 Adapt the use of language and written style to meet the customers' needs and understanding</p> <p>2.3 Ensure the needs of the organisation and customer are balanced in written communications with customers</p>			
3	Be able to support colleagues and monitor compliance with organisational communications guidelines in a contact centre	<p>3.1 Monitor the effectiveness of communications between customers and colleagues against organisational guidelines and standards</p> <p>3.2 Identify inadequacies in the standard of colleagues' verbal and/or written communications with customers</p> <p>3.3 Provide feedback and guidance for improvement to colleagues on the standard of verbal and/or written communications</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Understand the principles of communication with customers in a contact centre	4.1 Describe the features and benefits of the products and/or services offered or supported by the contact centre			
		4.2 Describe the organisational requirements and regulations that have an impact on communication with customers			
		4.3 Explain the organisational procedures and guidelines on written communication with customers			
		4.4 Explain the benefits and drawbacks of choosing verbal or written communication with customers			
		4.5 Describe the limits of authority of colleagues when dealing with the exchanges with customers			
		4.6 Explain the strengths and weaknesses of formal and informal methods of monitoring communication between colleagues and customers			
		4.7 Explain the techniques for providing colleagues with feedback and guidance on verbal and/or written communications with customers			

Learner name: _____

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Learner signature: _____

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Assessor signature: _____

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Internal verifier signature: _____

Date: _____

(if sampled)

Unit 59: Coordinate Customer Communication Processes in a Contact Centre

Unit reference number: T/503/0406

Level: 4

Credit value: 6

Guided learning hours: 12

Unit summary

This unit concerns being able to develop customer communication policies in a contact centre, support the development of customer service procedures and guidelines for use by front line colleagues in a contact centre, enhance customer service through effective customer communication and understand the principles of managing communication with customers in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to develop customer communication policies in a contact centre	1.1 Evaluate the costs and benefits of different media options for communicating with customers 1.2 Draft customer communication policies that fit organisational and customer service objectives 1.3 Gain management agreement to the customer communication policies			
2	Be able to support the development of customer service procedures and guidelines for use by front line colleagues in a contact centre	2.1 Ensure that customer service procedures and guidelines reflect customer service objectives 2.2 Evaluate the compliance of the draft procedures and guidelines with the customer communication policy 2.3 Reconcile customer communication policy with draft procedures and guidelines			
3	Be able to enhance customer service through effective customer communication in a contact centre	3.1 Identify teams' and individuals' areas for development in customer communication skills 3.2 Implement action to enhance team and individual communications skills that meet identified needs 3.3 Evaluate the effectiveness of skills development activities against communications policy objectives			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Understand the principles of managing communication with customers in a contact centre	4.1	Evaluate the products and/or services offered by or supported by the contact centre		
		4.2	Explain the impact of regulations and legislation on managing customer communication		
		4.3	Evaluate the components of a customer communication policy		
		4.4	Evaluate different methods for developing team and individual communications skills		

Learner name: _____

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Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 60: **Contribute to Performance Management in a Contact Centre**

Unit reference number: A/503/0407

Level: 3

Credit value: 4

Guided learning hours: 12

Unit summary

This unit concerns being able to monitor individual and team performance in a contact centre, contribute to the enhancement of performance and understand performance management in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to monitor individual and team performance in a contact centre	<p>1.1 Agree with colleagues how performance will be monitored within the team to meet performance objectives</p> <p>1.2 Carry out performance monitoring activities in accordance with organisational procedures</p> <p>1.3 Identify shortfalls in performance against agreed objectives</p> <p>1.4 Provide feedback to colleagues in a way that is motivating and identifies areas for improvement</p>			
2	Be able to contribute to the enhancement of performance in a contact centre	<p>2.1 Devise practicable strategies for managing the pressure of workflow in operational bottlenecks</p> <p>2.2 Provide support in accordance with organisational performance needs</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand performance management in a contact centre	3.1			
		Describe the features and benefits of the products and/or services offered or supported by the contact centre			
		3.2			
		Describe the effect of organisational procedures and guidelines on contact centre operations			
		3.3			
		Explain the impact of regulations and legislation on contact centre operations			
		3.4			
		Explain the importance of performance management for achieving efficiency in contact centre operations			
		3.5			
		Explain the importance of providing feedback that is both motivational and identifies actions for performance improvement			

Learner name: _____

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(if sampled)

Unit 61: Maintain Customer Support Operations in a Contact Centre

Unit reference number: L/503/0427

Level: 4

Credit value: 5

Guided learning hours: 8

Unit summary

This unit concerns being able to review customer contact activities in a contact centre, deal with customer complaints about customer contacts and/or products and/or services, ensure compliance with organisational regulatory requirements and understand the management of customer support operations in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to review customer contact activities in a contact centre	<p>1.1 Carry out spot checks of customer contacts in accordance with organisational guidelines</p> <p>1.2 Carry out audits of working practices relating to customer contact activities in accordance with organisational guidelines</p> <p>1.3 Take action to address areas identified as needing enhancement</p>			
2	Be able to deal with customer complaints about customer contacts and/or products and/or services	<p>2.1 Establish the nature of complaints in accordance with organisational guidelines</p> <p>2.2 Explain the advantages and disadvantages of identified options</p> <p>2.3 Agree the optimum option with the customer that meets their needs</p> <p>2.4 Record the closure of the complaint in accordance with organisational guidelines</p> <p>2.5 Identify learning points from an analysis of complaints</p>			
3	Be able to ensure compliance with organisational and regulatory requirements in a contact centre	<p>3.1 Confirm the organisational and regulatory requirements relating to customer contact activities</p> <p>3.2 Establish the risks of non-compliance with requirements relating to customer contact activities</p> <p>3.3 Take action to address activities identified as non-compliant</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Understand the management of customer support in a contact centre	4.1	Explain the organisational procedures and guidelines and regulations and legislation relevant to organisational customer contact activities		
		4.2	Explain the plans for customer service audits		
		4.3	Explain the impact of organisational aims on customer contact		
		4.4	Analyse organisational customer complaints referral process		
		4.5	Explain the importance of keeping comprehensive records of customer problems and complaints and how they have been resolved		
		4.6	Analyse different techniques for identifying and evaluating options for dealing with customer problems and complaints		

Learner name: _____

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Internal verifier signature: _____

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(if sampled)

Unit 62: Contribute to Resource Plan Development in Contact Centre Operations

Unit reference number: L/503/0430

Level: 3

Credit value: 7

Guided learning hours: 38

Unit summary

This unit concerns being able to produce demand forecasts for contacts handled by contact centres, carry out scheduling and staffing activities and understand how to develop a resource plan for contact centre operations.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to produce demand forecasts for contacts handled by contact centres	<p>1.1 Identify the metrics that represent demand for contact centre services</p> <p>1.2 Identify resource needs for contact centre staff from an analysis of demand</p> <p>1.3 Predict demand for contact centre resources within agreed tolerances</p> <p>1.4 Explain the reasons for anticipated changes in demand for contact centre resources</p>			
2	Be able to carry out scheduling and staffing activities in a contact centre	<p>2.1 Identify practicable options to address resource planning issues in consultation with colleagues</p> <p>2.2 Brief colleagues on demand trends and forecasts, resource availability and their implications for meeting organisational objectives</p> <p>2.3 Identify staff availability, preferences and constraints in context of business needs</p> <p>2.4 Plan the deployment of staff to meet business needs and changing requirements</p>			
3	Understand how to develop a resource plan for contact centre operations	<p>3.1 Explain the impact of organisational requirement and regulation and legislation on contact centre operations</p> <p>3.2 Explain the organisational procedures and guidelines relating to resourcing contact centre operations</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.3 Explain the importance of resource planning in the context of efficient contact centre operations 3.4 Explain different techniques for monitoring and analysing resource needs in a contact centre 3.5 Explain different techniques for predicting demand for contact centre resources 3.6 Explain the importance of using confidence limits in demand forecasts in contact centres 3.7 Explain how to use employee data and work records for resource planning purposes 3.8 Explain the importance of considering staff availability, constraints and preferences when scheduling work 3.9 Explain the importance of communication with colleagues about contact centre demand, resource availability and resource plans			

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(if sampled)

Unit 63: Manage Incidents Referred to a Contact Centre

Unit reference number: K/503/0418

Level: 3

Credit value: 6

Guided learning hours: 30

Unit summary

This unit concerns being able to manage incidents through a contact centre, provide support to colleagues on incident management and understand management of incidents reported to a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to manage incidents through a contact centre	1.1 Respond to incoming contacts relating to incidents in accordance with organisational procedures			
		1.2 Select resources that are available to deal with reported incidents			
		1.3 Inform the selected personnel of their responsibilities in accordance with organisational procedures			
		1.4 Specify the action needed from personnel that are deployed to deal with the incident in accordance with organisational procedures			
		1.5 Monitor the management of the incident in accordance with organisational procedures			
		1.6 Ensure that the correct decision paths have been followed to manage reported incidents			
		1.7 Deal with queries and/or complaints about incident handling in accordance with organisational procedures			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Be able to provide support to colleagues on incident management in a contact centre	<p>2.1 Agree with colleagues the areas in which they need support and guidance in incident management</p> <p>2.2 Agree with colleagues the type of support that will provide them with support that is capable of meeting their identified needs</p> <p>2.3 identify actions to improve team performance in incident handling from a review of incident management results</p>			
3	Understand how to manage incidents reported to a contact centre	<p>3.1 Explain the incident management services offered by the contact centre</p> <p>3.2 Describe the strengths and weaknesses of methods of assessing the validity and priority of the potential incident</p> <p>3.3 Explain the importance of clear communication using the most appropriate channel with those dealing with incidents</p> <p>3.4 Describe the strengths and weaknesses of ways of monitoring the actions of those deployed to deal with the incident</p> <p>3.5 Describe the strengths and weaknesses of different types of support for colleagues</p> <p>3.6 Explain the importance of reviewing incident management results</p>			

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(if sampled)

Unit 64: Bespoke Software

Unit reference number: J/502/4397

Level: 3

Credit value: 4

Guided learning hours: 30

Unit summary

This unit is about the skills and knowledge needed by an IT user to select and use a range of advanced bespoke software tools and techniques for complex or non-routine information.

Bespoke software tools and techniques at this level are defined as 'advanced' because:

- the software tools and functions used will be complex, and at times involve having the idea that there may be a tool or function to do something (eg improve efficiency or create an effect), exploring technical support, self-teaching and applying;
- the inputting, manipulating and outputting techniques will be complex, and will involve research, identification and application; and
- the user will take full responsibility for inputting, manipulating and outputting the information.

Assessment requirements/evidence requirements

Evidence of achievement can be derived from a variety of sources.

Learners who use their IT skills directly in their day-to-day work can prove their competence whilst doing so. Alternatively learners can use scenarios and knowledge tests – or a mixture of both – to demonstrate competence.

Assessment methodology

All ITQ units may be assessed using any method, or combination of methods, which clearly demonstrates that the learning outcomes and assessment criteria have been met.

Whilst assessors are required to have a sound understanding of the unit requirements and be able to give appropriate feedback to learners, they do not have to be A1 qualified. However, ideally every assessor should have ITQ Level 3 or equivalent in order to be able to adequately assess at that level and below.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Input and combine information using bespoke software	<p>1.1 Input relevant information accurately so that it is ready for processing</p> <p>1.2 Select and use appropriate techniques to link and combine information within the application and across different software applications</p>			
2	Create and modify appropriate structures to organise and retrieve information efficiently	<p>2.1 Evaluate the use of software functions to structure, layout and style information</p> <p>2.2 Create, change and use appropriate structures and/or layouts to organise information efficiently</p> <p>2.3 Manage data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available</p>			
3	Exploit the functions of the software effectively to process and present information	<p>3.1 Select and use appropriate tools and techniques to edit, analyse and format information</p> <p>3.2 Check information meets needs, using IT tools and making corrections as necessary</p> <p>3.3 Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs</p> <p>3.4 Select and use presentation methods to aid clarity and meaning</p>			

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(if sampled)

Unit 65: Leading a Sales or Marketing Team

Unit reference number: T/502/8641

Level: 3

Credit value: 4

Guided learning hours: 25

Unit summary

This unit aims to provide the skills needed to lead a sales or marketing team.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to set targets for the sales or marketing team	<p>1.1 Agree Specific, Measurable, Achievable, Realistic and Time-bound (SMART) targets for individuals and sales or marketing team performance</p> <p>1.2 Agree personal objectives for individual members of the sales or marketing team</p>			
2	Be able to support the motivation of the sales or marketing team	<p>2.1 Provide support to team members toward achieving targets and objectives</p> <p>2.2 Give recognition to individuals' successes</p> <p>2.3 Use individual rewards and incentives to maintain morale in a sales or marketing environment</p> <p>2.4 Encourage team members to put forward ideas</p> <p>2.5 Assist team members to overcome feelings of 'rejection' that are experienced as a result of a lack of success in sales or marketing endeavours</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to monitor and evaluate the progress of the sales or marketing team	3.1 Monitor activities and progress across the team in accordance with the sales or marketing plan 3.2 Monitor the achievements of individual and sales or marketing team targets in accordance with the sales or marketing plan 3.3 Monitor customer interaction with individual team members in accordance with the sales or marketing plan 3.4 Evaluate customer interaction with individual team members against agreed criteria 3.5 Monitor compliance with legal, regulatory and ethical requirements relating to sales or marketing team activities 3.6 Appraise the success of sales or marketing activities against agreed objectives and targets 3.7 Identify areas for improvement in sales or marketing activities			

Learner name: _____

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(if sampled)

Unit 66: Negotiating, Handling Objections and Closing Sales

Unit reference number: F/502/8612

Level: 3

Credit value: 4

Guided learning hours: 22

Unit summary

This unit aims to provide the skills to handle and overcome sales objections in order to be able to close the sale.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand how to handle objections and negotiate with the customer	1.1 Describe the scope of authority and responsibility when dealing with objections 1.2 Identify the resources available to counter the sales objections 1.3 Describe how to plan and prepare for negotiation 1.4 Describe how to use testimonials to progress a sale 1.5 Explain the advantages and disadvantages of different methods of closing a sale 1.6 Explain organisational procedures for documenting the negotiated sale			
2	Be able to prepare for objections and negotiation with the customer	2.1 Identify possible sales objections and appropriate responses prior to dealing with the customer 2.2 Confirm authorisation to negotiate 2.3 Prepare a negotiation plan that is capable of providing a mutually acceptable outcome			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to handle objections	3.1 Identify customer needs and wants in relation to objections by using a variety of questioning techniques			
		3.2 Identify and prioritise customers' concerns			
		3.3 Provide evidence to the customer of the strengths of the organisation's products or services			
		3.4 Confirm with the customer that the objection(s) have been overcome			
		3.5 Identify and respond to verbal and non-verbal buying signals in a way that is consistent with the nature of the signals			
4	Be able to negotiate with the customer	4.1 Carry out negotiations according to negotiation plan			
		4.2 Promote the benefits of what is being offered to the customer			
		4.3 Explain to the customer when and why no further adjustment is possible			
		4.4 Obtain support to progress negotiation that is outside own level of authority			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Be able to close the sale following negotiation	5.1 Apply a trial close in accordance with the negotiation plan 5.2 Respond to any further objections and concerns 5.3 Identify and make use of potential add-on, up-selling or cross-selling opportunities 5.4 Summarise agreements made in accordance with organisational procedures and close the sale			

Learner name: _____

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(if sampled)

Unit 67: Contributing to the Development and Launch of New Products and/or Services

Unit reference number: A/502/8639

Level: 3

Credit value: 4

Guided learning hours: 26

Unit summary

This unit aims to provide the knowledge and skills needed to contribute to the development of new products and/or services.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the product development process	1.1 Describe the sales forecasting technique used by the organisation			
		1.2 Explain the market features and trends relating to products or services in the market			
		1.3 Explain the customer base for the proposed product in terms of their wants and needs			
2	Be able to contribute to the product and/or service development and launch process	2.1 Consult with colleagues and selected customers about a new product or service strategy			
		2.2 Generate ideas and/or enhancements to others' ideas for new products or services that meet the development criteria			
		2.3 Screen new ideas in accordance with the organisation's guidelines, marketing objectives			
		2.4 Test the market for the proposed product and/or service in accordance with the development plan			
		2.5 Provide information about existing customers, their needs, wants and behaviours in accordance with the market analysis specification			
		2.6 Support the preparation of a business case for the launch of a new product and/or service in accordance with the development plan			
		2.7 Forecast sales to support business case preparation in accordance with the development plan			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.8 Prepare information for customers about the new product and/or service in accordance with the development plan			
	2.9 Use feedback from stakeholders to refine the new product and/or service			

Learner name: _____

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Learner signature: _____

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Assessor signature: _____

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Date: _____

(if sampled)

Unit 68: Set Objectives and Provide Support for Team Members

Unit reference number: M/600/9600

Level: 3

Credit value: 5

Guided learning hours: 35

Unit summary

This unit helps learners to set and support individuals and teams to achieve objectives.

Assessment requirements/evidence requirements

To pass the unit, learners must meet all of the assessment criteria.

Assessment methodology

This unit is assessed using evidence from the workplace, ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc.

Simulation is not allowed.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to communicate a team's purpose and objectives to the team members	1.1 Describe the purpose of a team. 1.2 Set team objectives with its members which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound). 1.3 Communicate the team's purpose and objectives to its members			
2	Be able to develop a plan with team members showing how team objectives will be met	2.1 Discuss with team members how team objectives will be met. 2.2 Ensure team members participate in the planning process and think creatively. 2.3 Develop plans to meet team objectives. 2.4 Set SMART personal work objectives with team members.			
3	Be able to support team members identifying opportunities and providing support.	3.1 Identify opportunities and difficulties faced by team members. 3.2 Discuss identified opportunities and difficulties with team members. 3.3 Provide advice and support to team members to overcome identified difficulties and challenges. 3.4 Provide advice and support to team members to make the most of identified opportunities.			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Be able to monitor and evaluate progress and recognise individual and team achievement	4.1 Monitor and evaluate individual and team activities and progress.			
		4.2 Provide recognition when individual and team objectives have been achieved			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 69: **Manage own Professional Development within an Organisation**

Unit reference number: L/600/9586

Level: 3

Credit value: 4

Guided learning hours: 20

Unit summary

This unit helps learners to produce, implement and review a personal professional development plan that supports development.

Assessment requirements/evidence requirements

To pass the unit, learners must meet all of the assessment criteria.

Assessment methodology

This unit is assessed using evidence from the workplace, ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc.

Simulation is not allowed.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to assess own career goals and personal development.	1.1 Identify own career and personal goals. 1.2 Assess how own career goals affect work role and professional development			
2	Be able to set personal work objectives	2.1 Agree SMART (Specific, Measurable, Achievable, Realistic and Time-bound) personal work objectives in line with organisational objectives			
3	Be able to produce a personal development plan	3.1 Identify gaps between objectives set, own current knowledge and skills. 3.2 Produce a development plan			
4	Be able to implement and monitor own personal development plan.	4.1 Plan activities identified in own development plan. 4.2 Explain how to monitor and review own personal development plan.			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 70: **Support Team Members in Identifying, Developing and Implementing New Ideas**

Unit reference number: L/600/9636

Level: 3

Credit value: 4

Guided learning hours: 20

Unit summary

This unit helps learners to support team members in identifying, developing and implementing new ideas. It also helps learners to provide recognition for innovation.

Assessment requirements/evidence requirements

To pass the unit, learners must meet all of the assessment criteria.

Assessment methodology

This unit is assessed using evidence from the workplace, ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc. Simulation is not allowed.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to develop team ideas and develop the creativity of team members	1.1 Encourage team members to identify ideas. 1.2 Record team members' ideas.			
2	Be able to assess the viability of team members' ideas	2.1 Assess with team members the potential benefits and risks associated with an idea, and the resources required			
3	Be able to support team members to implement ideas.	3.1 Explain how to support team members in submitting formal proposals for approval. 3.2 Explain to team members how to identify and overcome barriers to implementing an idea.			
4	Be able to implement team ideas.	4.1 Monitor the implementation of ideas by own team. 4.2 Communicate the progress of implementation to relevant others own organisation.			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 71: Plan, Allocate and Monitor Work of a Team

Unit reference number: Y/600/9669

Level: 3

Credit value: 5

Guided learning hours: 25

Unit summary

This unit helps learners to plan and allocate the work for a team, and support, monitor and improve team performance.

Assessment requirements/evidence requirements

To pass the unit, learners must meet all of the assessment criteria.

Assessment methodology

This unit is assessed using evidence from the workplace, ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc.

Simulation is not allowed

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to plan work for a team	1.1 Agree team objectives with own manager 1.2 Develop a plan for a team to meet agreed objectives, taking into account capacity and capabilities of the team.			
2	Be able to allocate work across a team	2.1 Discuss team plans with a team 2.2 Agree work allocation and SMART (Specific, Measurable, Achievable, Realistic and Time-bound) objectives with team members 2.3 Agree standard of work required by team			
3	Be able to manage team members to achieve team objectives	3.1 Support all team members in order to achieve team objectives			
4	Be able to monitor and evaluate the performance of team members	4.1 Assess team members' work against agreed standards and objectives 4.2 Identify and monitor conflict within a team 4.3 Identify causes for team members not meeting team objectives			
5	Be able to improve the performance of a team.	5.1 Identify ways of improving team performance 5.2 Provide constructive feedback to team members to improve their performance 5.3 Implement identified ways of improving team performance			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 72: Manage Customer Service in Own Area of Responsibility

Unit reference number: D/600/9804

Level: 3

Credit value: 4

Guided learning hours: 25

Unit summary

This unit will ensure that learners are able to explain customer service standards to support staff and monitor customer service performance in own area of responsibility.

Assessment requirements/evidence requirements

To pass the unit, learners must meet all of the assessment criteria.

Assessment methodology

This unit is assessed using evidence from the workplace, ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc. Simulation is not allowed.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to establish and communicate measurable customer service standards for own area of responsibility	1.1 State organisational, legal and regulatory requirements for customer service standards 1.2 Explain expected standards for customer service performance to employees in own area of responsibility 1.3 Describe measurement criteria to monitor customer service performance			
2	Be able to support staff in meeting customer service standards	2.1 Identify staff and other resources to meet customer service standards 2.2 Communicate roles and responsibilities to employees and provide support 2.3 Describe how to resolve customer service queries within own organisation's policy			
3	Be able to monitor and evaluate customer service performance, systems and processes.	3.1 Monitor customer service performance against established criteria 3.2 Analyse feedback from staff and customers on the quality of customer service 3.3 Evaluate customer feedback and identify areas for improvement 3.4 Recommend changes to customer service processes or standards based on performance evaluation			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Guided learning hours: 20

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand own responsibilities under equality legislation, relevant codes of practice and own organisational policies	1.1 Explain how equality of opportunity, diversity and inclusion relate to legal, industry requirements and organisational policies 1.2 Describe how equality of opportunity, diversity and inclusion are considered in planning in own area of responsibility			
2	Be able to communicate an organisation's written equality, diversity and inclusion policy and procedures in own area of responsibility	2.1 Outline an organisation's written equality, diversity and inclusion policy and procedures			
3	Be able to monitor equality, diversity and inclusion within own area of responsibility	3.1 Monitor how equality, diversity and inclusion activities in own area of responsibility in line with own organisation			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 74: Manage Conflict in a Team

Unit reference number: R/600/9685

Level: 3

Credit value: 3

Guided learning hours: 20

Unit summary

This unit will ensure that learners understand how to identify potential and actual conflicts within a team and take action to resolve them.

Assessment requirements/evidence requirements

To pass the unit, learners must meet all of the assessment criteria.

Assessment methodology

This unit is assessed using evidence from the workplace, ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc.

Simulation is not allowed.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to support team members' understanding of their role and position within a team	1.1 Communicate to team members the standards of work and behaviour expected of them 1.2 Explain how team members can work together and support each other			
2	Be able to take measures to minimise conflict within a team	2.1 Identify issues with organisational structures, systems or procedures that are likely to give rise to conflict. 2.2 Identify potential conflict between team members. 2.3 Explain action required to avoid potential conflict and agree strategies for conflict resolution.			
3	Be able to understand how to encourage team members to resolve their own conflicts	3.1 Explain how team members can be encouraged to identify and resolve their own problems and conflicts. 3.2 Explain how respect can be developed and maintained between team members.			
4	Be able to understand legal and organisational requirements concerning conflict	4.1 Explain legal and organisational requirements concerning conflict in own team 4.2 Explain how to maintain complete, accurate and confidential records of conflicts and their outcomes			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 75: Lead and Manage Meetings

Unit reference number: Y/600/9686

Level: 3

Credit value: 4

Guided learning hours: 20

Unit summary

This unit will ensure that learners are able to prepare for, lead and follow up issues identified in meetings.

Assessment requirements/evidence requirements

To pass the unit, learners must meet all of the assessment criteria.

Assessment methodology

This unit is assessed using evidence from the workplace, ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc.

Simulation is not allowed.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to prepare to lead a meeting	1.1 Perform activities needed to be carried out in preparation for leading a meeting.			
		1.2 Produce documentation in support of activities			
2	Be able to manage meeting procedures.	2.1 Identify any formal procedures that apply in own organisation			
3	Be able to chair a meeting	3.1 Manage the agenda in cooperation with participants to ensure meeting objectives are met.			
		3.2 Produce minutes of the meeting and allocate action points after discussions			
4	Be able to undertake post-meeting tasks.	4.1 Explain that the minutes of the meeting provide an accurate record of proceedings.			
		4.2 Communicate and follow up meeting outcomes to relevant individuals			
		4.3 Evaluate whether the meeting's objectives were met and identify potential improvements.			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 76: Organise the Delivery of Reliable Customer Service

Unit reference number: Y/601/1230

Level: 3

Credit value: 6

Guided learning hours: 40

Unit summary

This unit is about how the learner delivers and maintains excellent and reliable customer service. The role of the learner may or may not involve supervisory or management responsibilities but they are expected to take some responsibility for the resources and systems they use which support the service that they give. In the learner's job they must be alert to customer reactions and know how they can be used to improve the service that they give. In addition, customer service information must be recorded to support reliable service.

Assessment requirements/evidence requirements

The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this unit. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner needs to include evidence that they have dealt with a variety of customers including:

- 1 customers who are easy to deal with
- 2 customers who are difficult to deal with
- 3 existing customers
- 4 new customers.

The learner's evidence must show that they have:

- 1 taken responsibility for their own actions in the delivery of customer service
- 2 used spontaneous customer feedback to improve customer service
- 3 used customer feedback that they have requested to improve customer service.

The system the learner uses for recording data can be manual or electronic.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Plan and organise the delivery of reliable customer service	1.1 Plan, prepare and organise everything they need to deliver services or products to different types of customers			
		1.2 Organise what they do to ensure that they are consistently able to give prompt attention to their customers			
		1.3 Reorganise their work to respond to unexpected additional workloads			
2	Review and maintain customer service delivery	2.1 Maintain service delivery during very busy periods and unusually quiet periods			
		2.2 Maintain service delivery when systems, people or resources have let them down			
		2.3 Consistently meet their customers' expectations			
		2.4 Balance the time they take with their customers with the demands of other customers seeking their attention			
		2.5 Respond appropriately to their customers when customers make comments about the products or services they are offering			
		2.6 Alert others to repeated comments made by their customers			
		2.7 Take action to improve the reliability of their service based on customer comments			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		2.8 Monitor the action they have taken to identify improvements in the service they give to their customers			
3	Use recording systems to maintain reliable customer service	3.1 Record and store customer service information accurately following organisational guidelines 3.2 Select and retrieve customer service information that is relevant, sufficient and in an appropriate format 3.3 Quickly locate information that will help solve a customer's query 3.4 Supply accurate customer service information to others using the most appropriate method of communication			
4	Understand how to organise the delivery of reliable customer service	4.1 describe organisational procedures for unexpected situations and their role within them 4.2 describe resource implications in times of staff sickness and holiday periods and their responsibility at these times 4.3 explain the importance of having reliable and fast information for their customers and their organisation 4.4 evaluate the organisational procedures and systems for delivering customer service 4.5 identify useful customer feedback and explain how to decide which feedback should be acted on 4.6 describe how to communicate feedback from			

	customers to others			
	4.7 evaluate the organisational procedures and systems for recording, storing, retrieving and supplying customer service information			
	4..8 explain the legal and regulatory requirements regarding the storage of data			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 77: Lead a Team to Improve Customer Service

Unit reference number: H/601/1568

Level: 3

Credit value: 7

Guided learning hours: 47

Unit summary

If the learner is responsible for leading a team delivering customer service, they need to plan and organise the team's work and support team members as they develop their performance. This unit is about looking at both the learner's organisation and their staffing resources and bringing these together in a constructive way to improve overall customer service. The learner will need to give support and guidance to their team to encourage them to improve their customer service delivery. It is about having a passion for customer service and sharing this enthusiasm with their colleagues and staff team. It is about leading by example.

Assessment requirements/evidence requirements

The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this unit. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner must provide evidence they have line management or supervisory responsibility for the team members used in their evidence.

The learner must show that they have taken into account the organisational constraints of:

- 1 time
- 2 human resources
- 3 physical resources
- 4 financial resources.

The learner must also show that they have taken into account the team or individual constraints of:

- 1 existing workloads
- 2 individual capabilities and sensitivities
- 3 initiatives and objectives currently being undertaken by the organisation
- 4 influences operating on the team from outside.

The learner's evidence must provide evidence that they have taken time with each team member to:

- 1 plan and organise their work
- 2 provide support and guidance
- 3 give and seek feedback on performance.

The feedback the learner provides to team members may be:

- 1 formal or informal
- 2 verbal or in writing.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Plan and organise the work of a team	1.1 Treat team members with respect at all times			
		1.2 Agree with team members their role in delivering effective customer service			
		1.3 Involve team members in planning and organising their customer service work			
		1.4 Allocate work which takes full account of team members' customer service skills and the objectives of the organisation			
		1.5 Motivate team members to work together to raise their customer service performance			
2	Provide support for team members	2.1 Check that team members understand what they have to do to improve their work with customers and why that is important			
		2.2 Check with team members what support they feel they may need throughout this process			
		2.3 Provide team members with support and direction when they need help			
		2.4 Encourage team members to work together to improve customer service			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Review performance of team members	3.1 Provide sensitive feedback to team members about their customer service performance			
		3.2 Encourage team members to discuss their customer service performance			
		3.3 Discuss sensitively with team members action they need to take to continue to improve their customer service performance			
4	Understand how to lead a team to improve customer service	4.1 Describe the roles and responsibilities of their team members and where the team members fit in the overall structure of the organisation			
		4.2 Explain how team and individual performance can affect the achievement of organisational objectives			
		4.3 Explain the implications of failure to improve customer service for their team members and their organisation			
		4.4 Describe how to plan work activities			
		4.5 Explain how to present plans to others to gain understanding and commitment			
		4.6 Explain how to facilitate meetings to encourage frank and open discussion			
		4.7 Explain how to involve and motivate staff to encourage teamwork			
		4.8 Describe how to recognise and deal sensitively with issues of underperformance			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 78: Gather, Analyse and Interpret Customer Feedback

Unit reference number: H/601/1571

Level: 3

Credit value: 10

Guided learning hours: 67

Unit summary

Customer service can be improved only if the learner is fully aware of customer wishes and expectations. The learner can discover much of this information by seeking structured feedback from their customers about the customer's experiences of the learner's services or products. When the information has been collected it must be analysed and interpreted in order to use it for making customer service improvements. This unit is about how the learner collects that feedback and prepares it for use in the improvement of customer service.

Assessment requirements/evidence requirements

The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this unit. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner's evidence must show that they have collected feedback from customers:

- 1 using informal methods such as conversation and observation of customer reactions
- 2 using two different formal methods such as questionnaire, telephone or interview surveys.

The learner's evidence must include feedback that they have collected:

- 1 using a method they have devised
- 2 following established organisational procedures.

The learner must provide evidence that they have displayed the results of their data collection:

- 1 in tabulated form
- 2 in graphical or pictorial form.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Plan to gather customer feedback	1.1 Identify the options available for collecting customer service feedback 1.2 Evaluate the costs and benefits of each option for collecting customer feedback 1.3 Select one or more methods for collecting customer feedback 1.4 Plan in detail what information they will collect from customers 1.5 Ensure the information they collect all has a customer service focus 1.6 Plan in detail how they will collect information from customers using their chosen method			
2 Gather customer feedback	2.1 Use their chosen method and detailed plan to collect customer feedback 2.2 Monitor the collection of customer feedback to ensure it is falling within their chosen sampling frame 2.3 Monitor the collection of customer feedback to ensure it focuses on customer service issues 2.4 Record the data they collect in a way that makes analysis and interpretation easy 2.5 Respect their customers' rights to confidentiality if the customers do not want their comments to be identified			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Analyse and interpret customer feedback	3.1 Collate data collected from customers in order to identify patterns and trends in customer service			
		3.2 Perform appropriate calculations to summarise patterns and trends in the data			
		3.3 Present their analysis in a form that is easily understood			
		3.4 Link their analysis with their knowledge of their organisation's service offer and customer service processes in order to interpret the meaning of the data			
		3.5 Make recommendations for changes in their organisation's service offer or customer service processes in response to the views of their customers			
		3.6 Identify ways in which customer feedback can be used to inform customers and develop the customer relationship			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Understand how to gather, analyse and interpret customer feedback	4.1 Explain random sampling techniques and how to evaluate bias in non-random samples			
		4.2 Identify principles of questionnaire design			
		4.3 Identify principles of effective interviewing			
		4.4 Explain how to calculate the cost of a customer survey			
		4.5 Describe techniques for monitoring data collection			
		4.6 Explain how to use appropriate software to record and analyse customer feedback			
		4.7 Describe methods of displaying and presenting data in a way that is easy to understand			
		4.8 Explain statistical techniques for summarising trends and patterns			
		4.9 Describe organisational procedures for recommending changes in the service offer or customer service procedures			
		4.10 Compare the advantages and disadvantages of collecting customer feedback through written questionnaires, by telephone, by interview, using focus groups or by internet or email			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 79: Monitor the Quality of Customer Service Transactions

Unit reference number: T/601/1574

Level: 3

Credit value: 7

Guided learning hours: 47

Unit summary

The quality of customer service transactions must be monitored if they are to benefit from actions to improve that overall quality. Quality in this area can be defined only in terms of agreed criteria and against agreed performance ratings. In an organisation that carries out a high volume of customer service transactions delivered face-to-face, by telephone or online, quality can be measured and improved only by adopting a systematic sampling approach. Spot checks and routine checks are needed to observe individual performance and results must be analysed to identify patterns and trends. Improvement can then occur as a result of feedback the learner gives to colleagues so that actions to improve individual performance can be taken. This unit is for the learner if one of their job responsibilities involves systematically sampling the quality of customer service transactions and working with colleagues to improve their performance.

Assessment requirements/evidence requirements

The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this unit. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

There are no additional evidence requirements other than those expressed within the unit.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Prepare to monitor the quality of customer service transactions	<p>1.1 Identify the criteria against which quality of customer service transactions will be monitored</p> <p>1.2 Agree a sampling frame for monitoring customer service transactions</p> <p>1.3 Follow organisational procedures to ensure their monitoring plans are compliant with any need for staff and customers to know they are being observed</p> <p>1.4 Identify ratings and scales against which quality of customer service transactions can be measured</p> <p>1.5 Ensure that they are totally familiar with the customer service procedures for transactions they are monitoring</p>			
2	Monitor the quality of customer service transactions	<p>2.1 Carry out spot checks on or observations of the quality of customer service transactions</p> <p>2.2 Carry out planned and routine checks on or observations of the quality of customer service transactions</p> <p>2.3 Observe or listen to a colleague dealing with a customer service transaction</p> <p>2.4 Record their observations of a colleague's performance against agreed quality criteria</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		2.5 Make judgements about their colleague's quality of service delivery by allocating a performance rating against a defined and agreed rating scale			
		2.6 Analyse and summarise their observations to identify patterns and trends in their colleague's performance			
3	Give feedback on the quality of customer service transactions	3.1 Engage with their colleague in preparation for giving feedback on the quality of their customer service delivery 3.2 Provide positive feedback to their colleague by identifying features of customer service that they delivered particularly well 3.3 Give feedback to their colleague regarding features of their customer service delivery that would benefit from development 3.4 Propose actions for coaching or training of a colleague in areas that would improve their customer service delivery 3.5 Maintain records of customer service quality monitoring and action plans for improvements			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Understand how to monitor the quality of customer service transactions	4.1 Review the criteria against which the quality of customer service delivery is judged in their organisation			
		4.2 Describe ways to construct a representative sample of customer service transactions in order to monitor quality			
		4.3 Explain the importance of compliance with guidelines about ensuring customers and colleagues know they are being observed to monitor quality of service			
		4.4 Explain how to define ratings and scales against which customer service transactions can be judged			
		4.5 Explain their organisation's procedures and guidelines for customer service delivery			
		4.6 Describe ways to record details of customer service transactions they have observed in order to provide feedback			
		4.7 Describe techniques for analysing and summarising observations in order to identify patterns and trends in customer service delivery			
		4.8 explain the importance of providing positive feedback to a colleague prior to identifying areas for improvement			
		4.9 describe sources of information about coaching and training options to improve customer service delivery			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	4.10 explain the importance of keeping detailed records of coaching and training relating to customer service delivery			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 80: Build a Customer Service Knowledge Set

Unit reference number: K/601/1233

Level: 3

Credit value: 7

Guided learning hours: 47

Unit summary

Effective and improving customer service may make use of a customer service knowledge set. This information base is built up continuously as the organisation learns from interaction with its customers. A knowledge set may contain a wide variety of information about customers and their transactions with the organisation. It will, in any case, rely on the actions of the learner and their colleagues in direct contact with customers to build and grow as a useful customer service tool. This unit is all about actions the learner takes to add to the information set and how they use it to develop the way they deal with customer transactions. This unit is for a learner only if their organisation has a systematic and technology-supported approach to building a customer information set.

Assessment requirements/evidence requirements

The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this unit. Simulation is not allowed for any evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

There are no additional evidence requirements other than those expressed within the unit.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Input details of customer queries and requests and develop responses	1.1	Identify through active listening customer queries and comments for inclusion in the knowledge set		
		1.2	Classify information collected through customer contact for inclusion in the knowledge set		
		1.3	Identify questions frequently asked by customers		
		1.4	Identify the broad customer service messages of their organisation's answers to frequently asked questions		
		1.5	Work with colleagues to develop responses to customer queries and requests		
		1.6	Contribute ideas and responses to the customer knowledge set which build on key organisational customer service messages		
		1.7	Check the effects of possible responses included in the knowledge set with customers		
		1.8	Monitor the customer service knowledge set to identify trends and patterns		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Use a customer service knowledge base	2.1 Access information from the customer service knowledge set using specific search criteria			
		2.2 Browse the customer service knowledge set to research a topic of interest or project area			
		2.3 Use the customer service knowledge set to inform the introduction of a new product or service variation			
		2.4 Use the customer service knowledge set to respond to a specific customer request or query			
		2.5 Assist a colleague to locate specific information in the customer service knowledge set			
		2.6 Add to the customer service knowledge set as a result of dealing with a customer request or query			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand how to build a customer service knowledge set	3.1 Explain the structure and content of their organisation's customer service information set			
		3.2 Describe how to input and update routines for adding to the customer service knowledge set			
		3.3 Identify ways that information in a customer service knowledge set can be classified			
		3.4 Identify questions frequently asked by customers of their organisation			
		3.5 Explain the importance of working with colleagues to develop responses to customer requests and queries			
		3.6 Describe their organisation's key messages in relation to the services or products they are delivering			
		3.7 Identify ways to interpret information in a customer service knowledge set			
		3.8 Describe techniques for assisting a colleague to locate information in a customer service knowledge set			

Learner name: _____

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Assessor signature: _____

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Date: _____

(if sampled)

Unit 81: Handle Referred Customer Complaints

Unit reference number: K/601/1524

Level: 4

Credit value: 10

Guided learning hours: 67

Unit summary

However effectively customer service is organised, customers make complaints from time to time. In some organisations, it is simply a matter of procedure for all complaints to be handled by particular people. Sometimes, front-line staff or supervisors can deal with these complaints; however, often more senior staff must deal with the complaint. This is either because of the severity of the complaint and its implications for the organisation, or because the customer will accept the solution only if it is dealt with at a senior level. This may require someone with the authority and influence to adapt existing policies and procedures to find an acceptable solution. It is also important for this person to explore patterns and trends in significant complaints and recommend changes to policies and procedures to avoid repetition.

Assessment requirements/evidence requirements

The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this unit. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner must provide evidence that they have collected and analysed including:

- 1 qualitative information
- 2 quantitative information.

The learner must show that they have dealt with complaints from customers who are:

- 1 prepared to accept their proposed solutions
- 2 not prepared to accept their proposed solutions.

The complaints included in the learner's evidence must include examples of:

- 1 a difference between customer expectations and what is offered by their organisation
- 2 a problem resulting from a system or procedure failure
- 3 a problem resulting from a shortage of resources or human error.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Investigate referred customer complaints	1.1 Collect all the available information on the nature of the complaint and identify and analyse the organisational implications of the complaint			
		1.2 Take personal responsibility for dealing with the complaint subject to the limits of their authority			
		1.3 Keep their customer informed about what steps are being taken to deal with the customer's complaint			
		1.4 Follow the correct procedures if their customer wishes to escalate the complaint even higher or if the complaint has wider implications for the organisation			
2	Take action to deal with referred customer complaints	2.1 Identify a range of possible solutions that balance customer expectations and the organisation's service offer			
		2.2 Liaise with their customer and colleagues to negotiate an acceptable solution			
		2.3 Agree a solution that adapts current policies and procedures within their own authority and furthers their organisation's aims and objectives			
		2.4 Implement the agreed solution and liaise with their customer to ensure that the customer is satisfied with the action that has been taken			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Identify repeated customer complaints and recommend changes to policies and procedures	3.1 Identify patterns and trends in customer complaints 3.2 Analyse trends in customer complaints 3.3 Identify solutions acceptable to their customers that fit the organisation's service offer 3.4 Identify possible changes to customer service policies and procedures 3.5 Consider the benefits and drawbacks of each possible change in terms of balancing customer service and organisational aims 3.6 Select an option for change and follow organisational procedures to ensure that their recommendations come to the attention of decision makers			
4	Understand how to handle referred customer complaints	4.1 Explain the importance of minimising customer complaints and dealing with them effectively and promptly when they occur 4.2 Explain their organisation's complaints procedures and the limits of their authority 4.3 Describe the procedures they must follow if a complaint is likely to be escalated or have wider implications 4.4 Describe the types of complaints that could have wider implications for their organisation 4.5 Explain why it is important to communicate with their customer at all stages of the complaints procedure			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>4.6 Explain how to devise solutions that balance customer expectations and organisational aims</p> <p>4.7 Explain why it is important to identify and present to the customer a range of possible options</p> <p>4.8 Explain why it may be necessary sometimes to adapt organisational policies and procedures to provide a solution acceptable to their customer and how they could justify this</p> <p>4.9 research how to identify trends and patterns in customer complaints and solutions</p> <p>4.10 describe how to explore the implications of these patterns and trends for their organisations policies and procedures</p> <p>4.11 explain how to recommend changes to organisational policies and procedures</p>			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

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Internal verifier signature: _____

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(if sampled)

Unit 82: Champion Customer Service

Unit reference number: T/601/1235

Level: 4

Credit value: 10

Guided learning hours: 67

Unit summary

Staff with high levels of responsibility for customer service have an important role to play as champions of excellent service within their organisations. They should also promote customer service to service partners without whom their organisation cannot deliver reliable and excellent customer service. They need to have a great deal of knowledge and expertise from which others can benefit. This unit is about acting as a champion – being constantly alert for issues that affect customer service, analysing these issues and their implications, challenging on behalf of the customer and passing on any knowledge and expertise to others.

Assessment requirements/evidence requirements

The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this unit. Simulation is not allowed for any evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time for their assessor to be confident that they are competent.

The learner must provide evidence that they have monitored developments that, in relation to their own area of responsibility, are:

- 1 strategic
- 2 operational.

The learner's evidence must show that they have analysed the implications of customer service developments for:

- 1 the quality of services or products
- 2 the way services or products are delivered
- 3 customer relationships.

The learner must provide evidence that they have responded to requests for information and advice from two of these groups:

- 1 front line staff
- 2 supervisors or team leaders
- 3 senior managers
- 4 colleagues in other departments
- 5 service partners.

The learner's evidence must show that they have provided information and advice about:

- 1 the quality of services or products
- 2 the way services or products are delivered
- 3 customer relationships.

The learner's evidence must show that they have communicated customer service advice and information using two different communication media.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Promote the importance and benefits of customer service	1.1 Explain the role of customer service within their organisation's strategic and business plans			
		1.2 Monitor developments in their organisation in order to identify those important to customer service			
		1.3 Analyse the implications of these customer service developments			
		1.4 Question and challenge developments from the customer's standpoint			
		1.5 Use their influence to ensure that developments improve customer service			
2	Provide advice and information on customer service issues	2.1 Inform customer that they can provide customer service advice and information			
		2.2 Respond to requests for customer service advice and information			
		2.3 Carry out any necessary research to enhance or verify the advice and information they are giving			
		2.4 Communicate customer service advice and information effectively			
		2.5 Help others to explore the implications of their advice and information for their own work and identify actions that the advice and information might prompt			
		2.6 Monitor how effective their advice and information has been			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.7 Review the way they collect information, formulate advice and communicate it to others			
3 Know how to champion customer service	3.1 Describe the processes for decision making within their organisation and who is involved 3.2 Explain how to monitor developments within their organisation 3.3 Describe how to use their influence and authority to affect decision making 3.4 Assess the types of developments that are likely to affect customer service and how to analyse the implications for customer service 3.5 Explain the importance of empathising with customers and how to represent their viewpoint in a constructive way 3.6 Explain how to identify when others need advice and information on customer service issues 3.7 Explain how to use different types of research to support their advice and information on customer service 3.8 Explain how to apply their advice and information in practice 3.9 Explain how to monitor the effect of their advice and information			

Learner name: _____

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(if sampled)

Unit 83: Improve Organisational Effectiveness and Personal Development in a Contact Centre

Unit reference number: R/503/0350

Level: 4

Credit value: 5

Guided learning hours: 10

Unit summary

This unit concerns being able to prepare individual and team development plans in a contact centre, organise feedback collection to support personal development and organisational effectiveness, promote and support actions to improve organisational effectiveness and understand the principles underpinning personal development and organisational effectiveness in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to prepare individual and team development plans in a contact centre	<p>1.1 Assess individual and team personal development against identified business needs</p> <p>1.2 Identify common themes from an analysis of individual and team development needs</p> <p>1.3 Identify existing development activities that are commensurate with identified development needs</p> <p>1.4 Identify options for other activities that would meet identified development needs</p> <p>1.5 Evaluate the strengths and weaknesses of sources of information about development activities relevant to contact centre operations</p> <p>1.6 Approve individual and team development plans that meet the requirement</p>			
2	Be able to organise feedback collection to support personal development and organisational effectiveness in a contact centre	<p>2.1 Organise opportunities for individuals and teams to obtain feedback without interruption to service</p> <p>2.2 Enable individuals to have access to information about their personal development and organisational effectiveness needs</p> <p>2.3 Identify opportunities for personal development and improvements in organisational effectiveness based on feedback</p> <p>2.4 Confirm that feedback is current and relevant to the contact centre</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to promote and support actions to improve organisational effectiveness in contact centre operations	3.1 Encourage suggestions for improvements in organisational effectiveness 3.2 Make individuals aware of the procedures that will facilitate suggestions for improvements in contact centre operations 3.3 Prioritise suggestions for improvements in contact centre operations 3.4 Make recommendations for improvements in contact centre operations in accordance with organisational procedures			
4	Understand the principles underpinning personal development and organisational effectiveness in a contact centre	4.1 Describe the products and/or services offered or supported by the contact centre 4.2 Explain the requirements of contact centre operational procedures and guidelines 4.3 Explain the regulation and legislation that have an impact on contact centre operations 4.4 Explain the strengths and weaknesses of techniques to assess team and individual personal development needs 4.5 Explain the importance of prioritising actions which encourage suggestions for improvements in contact centre operations			

Learner name: _____

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(if sampled)

Unit 84: Manage Health and Safety Procedures in a Contact Centre

Unit reference number: A/503/0357

Level: 4

Credit value: 4

Guided learning hours: 20

Unit summary

This unit concerns being able to review health and safety procedures in a contact centre, implement actions to enhance health and safety procedures and understand the principles underpinning health and safety in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to review health and safety procedures in a contact centre	1.1 Establish the effectiveness of organisational procedures for health and safety 1.2 Identify options for improving health and safety procedures 1.3 Analyse the benefits and drawbacks of each option for the enhancement of health and safety procedures 1.4 Present recommendations for the enhancement of health and safety procedures by the agreed method			
2	Be able to implement actions to enhance health and safety procedures in a contact centre	2.1 Develop a plan that addresses areas identified for enhancement 2.2 Brief colleagues who are responsible for implementing the plan as to the likely effects on contact centre operations 2.3 Communicate the plan to everyone who may be affected 2.4 Meet the timescale of the implementation plan 2.5 Review the effectiveness of the implementation against its objectives 2.6 Make recommendations for adjustments to the plan and/or procedures following an analysis of the implementation			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand the principles underpinning health and safety in a contact centre	3.1 Explain organisational health and safety systems and procedures			
		3.2 Explain the importance of matching operational needs of a contact centre with health and safety requirements			
		3.3 Evaluate the benefits and drawbacks of proposed actions to enhance health and safety procedures			
		3.4 Justify what needs to be included in a plan to implement enhancements to health and safety			
		3.5 Explain the importance of monitoring the effects of enhancements to health and safety procedures			

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(if sampled)

Unit 85: Develop Health and Safety Policy and Procedures in a Contact Centre

Unit reference number: J/503/0359

Level: 5

Credit value: 7

Guided learning hours: 20

Unit summary

This unit concerns being able to develop a strategy for health and safety in a contact centre, support the development of health and safety policy and procedures and understand the principles underpinning health and safety policy in contact centre operations.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to develop a strategy for health and safety in a contact centre	1.1 Define the strategic requirements for formal risk assessments, health and safety procedures and audits which comply with regulations and meet operational needs			
		1.2 Identify the business areas that must be served by health and safety procedures			
		1.3 Monitor the use of health and safety procedures for risk assessments and health and safety audits in accordance with the compliance plan			
		1.4 Identify the need for changes which meet contact centre business needs from an analysis of the results of health and safety compliance monitoring			
		1.5 Evaluate the benefits and drawbacks of changes to health and safety policy			
		1.6 Develop a strategy for health and safety in accordance with organisational requirements			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Be able to support the development of health and safety policy and procedures in contact centre operations	2.1 Develop health and safety policies and procedures that meet identified requirements, taking colleagues' views into account			
		2.2 Prepare a business case supporting the need for change or maintaining the status quo which is supported by evidence			
		2.3 Negotiate the adoption of those changes that need to be made to health and safety policies procedures with minimum disruption to business			
3	Understand the principles underpinning health and safety policy in contact centre operations	3.1 Evaluate the impact of health and safety regulations and legislation relevant to contact centres			
		3.2 Explain the basis for the design of organisational health and safety policies and procedures			
		3.3 Explain the organisation's business aims and needs that may be affected by health and safety policies and procedures			
		3.4 Explain the components of a health and safety audit			
		3.5 Explain the characteristics of an effective audit			
		3.6 Explain the importance of balancing health and safety requirements with contact centre business needs			
		3.7 Explain the strengths and weaknesses of techniques for negotiating policy changes to health and safety			

Learner name: _____

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(if sampled)

Unit 86: Develop Customer Service Procedures for Use in a Contact Centre

Unit reference number: A/503/0391

Level: 5

Credit value: 6

Guided learning hours: 12

Unit summary

This unit concerns being able to set organisational aims and objectives that have an impact on customer service delivery in a contact centre, develop procedures for customer service and understand the development of customer service procedures in contact centres.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to set organisational aims and objectives that have an impact on customer service delivery in a contact centre	<p>1.1 Assess the contribution of contact centre operations to the achievement of organisational business objectives</p> <p>1.2 Develop the contact centre's service offer and its limits to meet organisational objectives</p> <p>1.3 Use customer classification to define service standards in a contact centre that meet organisational objectives</p>			
2	Be able to develop procedures for customer service through a contact centre	<p>2.1 Produce design options for customer service procedures that are consistent with agreed requirements and budgets</p> <p>2.2 Consult relevant people when developing different design options</p> <p>2.3 Ensure the design options conform with legal requirements and with any organisational strategy and policy for customer service</p> <p>2.4 Ensure design options take account of stakeholders' needs</p> <p>2.5 Confirm the fitness for purpose of proposed procedures and guidelines following a trial</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand the development of customer service procedures in contact centres	3.1 Evaluate the impact of organisational and regulatory requirements on customer service delivery in the contact centre			
		3.2 Explain the link between the organisation's customer service aims and objectives and the service offer(s) of the contact centre			
		3.3 Explain how to define a service offer for a customer			
		3.4 Explain how to trial draft customer service procedures and guidelines			

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(if sampled)

Unit 87: Manage the Use of Contact Centre Systems and Technology

Unit reference number: R/503/0378

Level: 4

Credit value: 6

Guided learning hours: 20

Unit summary

This unit concerns being able to manage the use of contact centre systems and technology operations, modify contact centre system parameters to optimise performance, develop policy for continuity and ongoing development of contact centre systems and understand management of contact centre systems and technology.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to manage the use of contact centre systems and technology operations	<p>1.1 Use agreed performance metrics to monitor the efficiency of the systems</p> <p>1.2 Monitor the production of routine and specialist reports according to organisational guidelines</p> <p>1.3 Identify opportunities to enhance system performance from an analysis of monitoring reports and performance metrics</p> <p>1.4 Identify options for enhancements to the system configuration that are capable of improving business performance</p> <p>1.5 Implement configuration parameter changes in accordance with organisational procedures</p> <p>1.6 Manage contacts efficiently by using predictive contact queuing rules according to organisational guidelines</p>			
2	Be able to modify contact centre system parameters to optimise performance	<p>2.1 Establish contact priorities by setting routing rules that meet customer expectations and organisational guidelines</p> <p>2.2 Evaluate the benefits and drawbacks of different routing parameters against agreed criteria</p> <p>2.3 Analyse the effects of alterations to applications and systems against agreed criteria</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to develop policy for continuity and ongoing development of contact centre systems	3.1 Develop operational continuity plans for systems in accordance with organisational processes and procedures and rules and regulations and the results of risk assessments for any proposed changes			
		3.2 Gain agreement to the operational continuity policy and plans			
4	Understand the management of contact centre systems and technology	4.1 Explain the service offer of the contact centre and the boundaries placed on that offer			
		4.2 Explain the impact of regulation and legislation on contact centre operations, systems and technology			
		4.3 Explain how to design performance metrics that are clear indicators of efficiency in contact centre operations			
		4.4 Explain how to use the results of risk assessments of systems and technology			

Learner name: _____

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Internal verifier signature: _____

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(if sampled)

Unit 88: Develop strategy for Contact Centre Systems and Technology

Unit reference number: L/503/0380

Level: 5

Credit value: 7

Guided learning hours: 12

Unit summary

This unit concerns being able to develop strategy for contact centre systems and technology, develop organisational policy to ensure operational continuity for contact centre systems and technology and understand the strategic implications of contact centre systems and technology capability.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to develop strategy for contact centre systems and technology	<p>1.1 Identify the aspects of business strategy that are influenced by systems and technology</p> <p>1.2 Develop a strategy that meets current and anticipated requirements of contact centre systems</p> <p>1.3 Ensure the strategy complements the contact centre's business strategy through consultation with colleagues</p>			
2	Be able to develop organisational policy to ensure operational continuity for contact centre systems and technology	<p>2.1 Identify the policy drivers that result from systems and technology strategy and operational requirements</p> <p>2.2 Evaluate the risks associated with breaches of operational continuity resulting from systems or technology failure</p> <p>2.3 Identify risk mitigation measures that are commensurate with the degree of risk</p> <p>2.4 Develop organisational policy for systems in accordance with organisational standards</p> <p>2.5 Secure commitment to the policy through consultation with colleagues</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand the strategic implications of contact centre systems and technology capability	3.1 Evaluate organisational procedures and guidelines and the structure of contact centre tasks that are affected by operational continuity issues and business strategy			
		3.2 Evaluate the impact of regulation and legislation on the options for contact centre strategy and policy			
		3.3 Explain the decision-making process in agreeing strategies and policies for systems and technologies			
		3.4 Explain the advantages and disadvantages of different options for mitigating the risks associated with system failure			
		3.5 Explain the strategic importance of linking the systems and technology and business strategy			

Learner name: _____

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(if sampled)

Unit 89: Manage Direct Sales Operations in a Contact Centre

Unit reference number: Y/503/0401

Level: 5

Credit value: 7

Guided learning hours: 30

Unit summary

This unit concerns being able to contribute to the development of organisational sales strategy in a contact centre, develop procedures and guidelines to be used for direct sales, review sales planning, analysis and reporting techniques for direct sales and understand the principles underpinning direct sales activities in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to contribute to the development of organisational sales strategy in a contact centre	<p>1.1 Identify the features of organisational sales strategy that have an impact on direct sales operations</p> <p>1.2 Recommend developments to the sales strategy that are capable of enhancing sales performance</p>			
2	Be able to develop procedures and guidelines to be used for direct sales through a contact centre	<p>2.1 Assess the importance of sales information that is needed to achieve the sales objectives</p> <p>2.2 Confirm that the required sales information can be collected with minimum disruption to sales activities</p> <p>2.3 Define the sales style and techniques to be used to achieve direct sales objectives</p> <p>2.4 Confirm the fitness for purpose of the draft procedures and guidelines through a test and trial</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to review sales planning, analysis and reporting techniques for direct sales through a contact centre	3.1 Review current sales plans and methods of devising them from an analysis of customer, market and sales information against agreed criteria			
		3.2 Identify the actions needed to achieve sales objectives and plans			
		3.3 Design sales analysis tools that are capable of monitoring sales and enhancing performance			
		3.4 Implement the agreed actions to enhance performance in accordance with the sales plan			
		3.5 Define sales reporting requirements that are capable of capturing the required monitoring and sales performance information			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Understand the principles underpinning direct sales activities in a contact centre	4.1	Evaluate the strategic implications of the range of products and/or services covered by contact centre direct sales		
		4.2	Evaluate current organisational approaches and systems for direct sales		
		4.3	Evaluate the impact of regulation and legislation on direct sales operations		
		4.4	Explain how to specify sales analysis requirements		
		4.5	Evaluate the implications of the options for sales monitoring tools		
		4.6	Evaluate how an organisational sales strategy drives direct sales operations		

Learner name: _____

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Learner signature: _____

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Assessor signature: _____

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Internal verifier signature: _____

Date: _____

(if sampled)

Unit 90: Manage Team and Individual Performance in Contact Centre Operations

Unit reference number: F/503/0408

Level: 4

Credit value: 5

Guided learning hours: 15

Unit summary

This unit concerns being able to organise performance-based feedback for contact centre colleagues, organise team and individual performance enhancement activities, manage organisational change and employee retention and understand the management of performance in a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to organise performance-based feedback for contact centre colleagues	<p>1.1 Identify a range of routes for obtaining feedback on performance in contact centre operations</p> <p>1.2 Allocate responsibility for contact centre performance management in a way that makes optimum use of resources</p> <p>1.3 Obtain usable feedback on performance from a range of sources</p>			
2	Be able to organise team and individual performance improvement activities for contact centre colleagues	<p>2.1 Identify opportunities for improvement from an analysis of feedback</p> <p>2.2 Agree strategies for team building and the improvement of team and individual performance that are capable of meeting identified objectives</p> <p>2.3 Monitor the progress of improvement activities and their effect against agreed objectives</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to manage organisational change in contact centre operations	3.1	Develop procedures and guidelines that address the area(s) of operations that are subject to change		
		3.3	Organise a programme of buddying and coaching support that supports the organisational change		
		3.4	Obtain formal and informal feedback on work satisfaction and the reason for resignations		
		3.5	Provide practicable advice to management on the steps that can be taken to improve staff retention		
4	Understand the management of performance in a contact centre	4.1	Evaluate the impact of organisational procedures and guidelines for contact centre operations on team and individual performance		
		4.2	Explain the importance of ensuring that performance management activities become part of day to day work and management		
		4.3	Explain how staff turnover can be mitigated through management actions		
		4.4	Explain the factors that influence staff retention		

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(if sampled)

Unit reference number:	A/503/0410
Level:	5
Credit value:	6
Guided learning hours:	16

This unit concerns being able to develop and implement a system for performance-based feedback in a contact centre, develop a performance management system, direct the strategic plan for change management and understand strategies for the enhancement of performance management systems in a contact centre.

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to develop a system for performance-based feedback in a contact centre	<p>1.1 Evaluate methods of obtaining and sharing feedback on performance against agreed criteria</p> <p>1.2 Develop practicable recommendations for improvements to the use of feedback on performance in the delivery of contact centre services</p> <p>1.3 Ensure that the system is capable of delivering the agreed objectives</p>			
2	Be able to develop and implement a performance management system in a contact centre	<p>2.1 Evaluate features of existing performance management metrics and systems that deliver the required management information</p> <p>2.2 Use feedback from colleagues to develop a performance management strategy that will meet agreed organisational strategies and objectives</p> <p>2.3 Evaluate options for enhancements in performance management systems against agreed criteria</p> <p>2.4 Implement the performance management strategy in accordance with the plan</p> <p>2.5 Monitor the efficiency of the performance management strategy in delivering the organisational strategy and systems</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to direct the strategic plan for change management in contact centre operations	<p>3.1 Establish the likely impact on operations of identified changes</p> <p>3.2 Devise a change management plan that is capable of managing the strategy for change</p> <p>3.3 Monitor changes in staff retention numbers and patterns</p> <p>3.4 Identify practicable management options for improving work satisfaction</p>			
4	Understand strategies for the development and enhancement of performance management systems in a contact centre	<p>4.1 Evaluate the impact of organisational procedures and regulation on contact centre operations, products and services</p> <p>4.2 Evaluate the factors involved in developing, enhancing and implementing a performance management strategy for a contact centre against agreed criteria</p> <p>4.3 Evaluate different methods of monitoring performance management systems and strategies against organisational strategy</p> <p>4.4 Explain the strengths and weaknesses of techniques for managing contact centre teams operating under pressure</p>			

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(if sampled)

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to link organisational strategy to customer systems and guidelines in a contact centre	<p>1.1 Explain how strategic aims have an impact on customer support for products and/or services</p> <p>1.2 Identify aspects of customer systems and guidelines that may benefit from a review</p>			
2	Be able to review customer service provision in a contact centre.	<p>2.1 Analyse current performance through a comparison of actual performance against expectations set out in organisational systems and guidelines</p> <p>2.2 Ensure the review covers customer identification and security, communication and dealing with problems and complaints, staff motivation and competence</p> <p>2.3 Identify actions to enhance customer service that are commensurate with identified needs</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to ensure compliance with organisational and regulatory requirements during customer contacts	3.1 Identify organisational and regulatory requirements that have an impact on customer contact activities			
		3.2 Establish the probability and consequences of non-compliance with organisational or regulatory requirements			
		3.3 Define checks that test compliance with organisational and regulatory requirements that are capable of meeting objectives			
		3.4 Implement compliance testing checks in accordance with the plan			
		3.5 Take action to address shortfalls in compliance with customer contact activity requirements that are commensurate with identified needs			
4	Understand the management of customer support operations in a contact centre	4.1 Evaluate the scope and effectiveness of organisational aims relevant to customer support			
		4.2 Evaluate the impact of regulation and legislation on customer support			
		4.3 Evaluate the efficiency of the process for reviewing and developing customer service systems and support			
		4.4 Evaluate different methods of developing staff skills to ensure the delivery of effective customer support in a contact centre			
		4.5 Explain the strengths and weaknesses of different risk assessment techniques applied to compliance risks in a contact centre			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	4.6 Explain how to assess probability and consequences of risk 4.7 Evaluate the effectiveness of different options to mitigate compliance risk 4.8 Explain why systems and guidelines may benefit from a review of efficiency			

Learner name: _____

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(if sampled)

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to develop organisational approaches to demand forecasting in a contact centre	<p>1.1 Identify the organisational strategy and objectives that provide pointers to future demand</p> <p>1.2 Assess the suitability of demand forecasting tools and the use of confidence limits for organisational objectives</p> <p>1.3 Adapt demand forecasting methods to meet specified requirements</p>			
2	Be able to allocate resources to meet demand in a contact centre	<p>2.1 Identify the resources needed for contact centre operations from an analysis of demand</p> <p>2.2 Identify the availability of suitable resources for deployment in contact centre operations</p> <p>2.3 Allocate resources in a way that optimise efficiency within the constraints</p>			
3	Be able to contribute to the development of resource policies in a contact centre	<p>3.1 Identify the strengths and weaknesses of current organisational resource policies in terms of the ability to achieve organisational objectives</p> <p>3.2 Confirm any need for any changes to organisational resource policies with colleagues</p> <p>3.3 Recommend changes to organisational resource policies that would improve efficiency in contact centre operations</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Understand the management of resource plans for contact centre operations	4.1 Analyse the impact of organisational requirement and regulation and legislation on contact centre operations			
		4.2 Evaluate the impact of organisational procedures and guidelines relating to resourcing contact centre operations			
		4.3 Explain the organisational strategies and objectives that may have an impact on resourcing contact centre operations			
		4.4 Explain the uses of confidence limits in demand forecasting			
		4.5 Explain the importance of reaching agreement with colleagues on the allocation of resources in contact centres			
		4.6 Explain the influence of resource allocation on business efficiency			

Learner name: _____

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(if sampled)

Unit 94: Coordinate Resource Planning Strategy in a Contact Centre

Unit reference number: T/503/0423

Level: 5

Credit value: 6

Guided learning hours: 12

Unit summary

This unit concerns being able to enhance contact centre strategy in terms of demand and resource implications, define organisational policies for resource management and understand resource management strategies for contact centre operations.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to enhance contact centre strategy in terms of demand and resource implications	<p>1.1 Evaluate the impact of business strategies on resourcing policies</p> <p>1.2 Evaluate the effectiveness of demand forecasting tools in use against agreed criteria</p> <p>1.3 Agree with colleagues the way in which resourcing policies, associated techniques and resourcing communication methods need to be enhanced</p> <p>1.4 Implement any agreed changes in demand forecasting and resourcing communications in accordance with the plan</p>			
2	Be able to define organisational policies for resource management for contact centre operations	<p>2.1 Identify the extent to which resourcing, scheduling and staffing policies meet organisational strategy or objectives</p> <p>2.2 Build colleagues' feedback into plans for enhancements to resource management strategies</p> <p>2.3 Ensure that organisational resourcing, scheduling and staffing policies meet identified objectives</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand resource management strategies for contact centre operations	3.1	Evaluate the impact of regulation and legislation on contact centre operations and resourcing		
		3.2	Explain the importance of matching demand forecasts with organisational strategy		
		3.3	Explain the importance and role of colleagues in reviewing and updating resource planning and management development		
		3.4	Evaluate the strengths and weaknesses of techniques for communicating demand forecasts and resource plans to contact centre staff		
		3.5	Explain the links between demand forecasting, resource planning and staffing requirements in a contact centre		

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(if sampled)

Unit 95: Manage Incident Management Systems in a Contact Centre

Unit reference number: H/503/0417

Level: 4

Credit value: 6

Guided learning hours: 12

Unit summary

This unit concerns being able to ensure the effective management of incidents through a contact centre, contribute to the development of organisational strategy for incident management and understand the management of incidents reported to a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to ensure the effective management of incidents through a contact centre	<p>1.1 Ensure compliance with organisational procedures for handling reported incidents through an analysis of incident handling against agreed criteria</p> <p>1.2 Use feedback to identify areas for enhancements to incident management systems</p> <p>1.3 Identify metrics that measure changes in performance in incident handling</p> <p>1.4 Use the findings of reviews to make recommendations for the enhancement of performance in accordance with organisational procedures</p> <p>1.5 Implement agreed changes in accordance with organisational procedures</p>			
2	Be able to contribute to the development of organisational strategy for incident management through a contact centre	<p>2.1 Use an analysis of evidence to establish the need for changes in incident management handling</p> <p>2.2 Develop recommendations for the ongoing review of organisational strategy for handling incidents in incident management</p> <p>2.3 Ensure that the revised strategy meets organisational objectives</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand the management of incidents reported to a contact centre	3.1 Explain the incident management services offered by the contact centre			
		3.2 Evaluate the strengths and weaknesses of methods of monitoring contact handling which leads to incident management			
		3.3 Evaluate the efficiency of techniques for analysing data and metrics relating to the handling of contacts which lead to incident management			
		3.4 Evaluate methods of assessing the effectiveness of incident management against agreed criteria			
		3.5 Explain the importance of defining the boundaries of procedures dealing with incident management and contact centre responsibilities			
		3.6 Explain the importance of consultation with colleagues regarding possible changes in procedures			
		3.7 Explain the organisational strategy relevant to incident management by the contact centre			

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(if sampled)

Unit 96: Develop Strategy for Incident Management by a Contact Centre

Unit reference number: R/503/0414

Level: 5

Credit value: 7

Guided learning hours: 12

Unit summary

This unit concerns being able to develop organisational strategy for incident management through a contact centre, develop organisational procedures for incident management and understand the development of strategy for incident management through a contact centre.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to develop organisational strategy for incident management through a contact centre	1.1 Establish the implications of linking incident management strategy and organisational strategy 1.2 Ensure the incident management strategy informs organisational policies and procedures 1.3 Communicate the requirements of the strategy to everyone who will be affected by it			
2	Be able to develop organisational procedures for incident management through a contact centre	2.1 Convert incident management strategic objectives into viable operational objectives and work flows 2.2 Use colleagues' feedback in the design of organisational procedures relating to incident management 2.3 Ensure incident management procedures include checks to ensure they are followed 2.4 Run a test prior to achieving agreement to ensure the fitness for purpose of the procedures 2.5 Monitor the effectiveness of the incident management procedures against agreed criteria 2.6 Use an analysis of monitoring data to make recommendations for the enhancement of incident management procedures			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand the development of strategy for incident management through a contact centre	3.1	Define the strategic aims of the incident management service offered by the contact centre		
		3.2	Evaluate the impact of regulation or legislation on incident management through a contact centre		
		3.3	Evaluate the impact of the incident management strategy		
		3.4	Evaluate techniques for defining the strategic aims of contact centre operations		
		3.5	Explain the importance of consulting colleagues about the practicality of strategies that might be proposed		
		3.6	Explain the importance of including checks in procedures to ensure that they are followed		
		3.7	Evaluate the strengths and weaknesses of methods of testing procedures against agreed criteria		

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(if sampled)

Unit 97: Contributing to the Development and Launch of New Products and/or Services

Unit reference number: A/502/8639

Level: 3

Credit value: 4

Guided learning hours: 26

Unit summary

This unit aims to provide the knowledge and skills needed to contribute to the development of new products and/or services.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration Assessment Strategy. Please see *Annexe D*.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the product development process	<p>1.1 Describe the sales forecasting technique used by the organisation</p> <p>1.2 Explain the market features and trends relating to products or services in the market</p> <p>1.3 Explain the customer base for the proposed product in terms of their wants and needs</p>			
2	Be able to contribute to the product and/or service development and launch process	<p>2.1 Consult with colleagues and selected customers about a new product or service strategy</p> <p>2.2 Generate ideas and/or enhancements to others' ideas for new products or services that meet the development criteria</p> <p>2.3 Screen new ideas in accordance with the organisation's guidelines, marketing objectives</p> <p>2.4 Test the market for the proposed product and/or service in accordance with the development plan</p> <p>2.5 Provide information about existing customers, their needs, wants and behaviours in accordance with the market analysis specification</p> <p>2.6 Support the preparation of a business case for the launch of a new product and/or service in accordance with the development plan</p> <p>2.7 Forecast sales to support business case preparation in accordance with the development plan</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.8 Prepare information for customers about the new product and/or service in accordance with the development plan			
	2.9 Use feedback from stakeholders to refine the new product and/or service			

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(if sampled)

Unit 98: Analyse the Market in Which Your Organisation Operates

Unit reference number: M/600/9791

Level: 4

Credit value: 5

Guided learning hours: 25

Unit summary

This unit will ensure that learners are able to analyse an organisation's market position and trends. Learners can analyse customer needs and communicate to stakeholders.

Assessment requirements/evidence requirements

Assessment must be carried out in way that is consistent with the requirements outlined in *Annexe D: Assessment requirements/strategy for Management and Leadership Units* To pass the unit, learners must meet all of the assessment criteria.

Assessment methodology

This unit is assessed using evidence from the workplace, ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc.

Simulation is not allowed.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to analyse customers' needs	1.1 Assess the economic environment in which your organisation operates 1.2 Evaluate your customers' needs and relate to own organisation 1.3 Analyse customer perception of own products/services in comparison to competitors			
2	Be able to analyse the market using research tools and techniques	2.1 Identify and utilise market research specialists if necessary 2.2 Analyse current and future macro- and microeconomic trends in own sector 2.3 Use recognised research tools to assess market trends and opportunities for growth			
3	Be able to communicate research findings to inform managerial decisions	3.1 Produce a report based on research findings 3.2 Communicate the report to key individuals within own organisation 3.3 Evaluate feedback from key individuals 3.4 Revise and communicate updated report to key individuals 3.5 Monitor the economic environment and changes in customers' needs			

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(if sampled)

Unit 99: Prepare for and Support Quality Audits

Unit reference number: Y/600/9798

Level: 4

Credit value: 4

Guided learning hours: 20

Unit summary

The unit will ensure that learners understand the quality standards and are able to participate in a quality audit and take corrective action.

Assessment requirements/evidence requirements

Assessment must be carried out in way that is consistent with the requirements outlined in *Annexe D: Assessment requirements/strategy for Management and Leadership Units*. To pass the unit, learners must meet all of the assessment criteria.

Assessment methodology

This unit is assessed using evidence from the workplace, ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc.

Simulation is not allowed.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the quality standards and procedures that apply to own area of responsibility	1.1 Describe the quality standards and procedures that apply to own area of responsibility.			
2	Be able to monitor work in own area of responsibility against quality standards and procedures	2.1 Select and apply methods for monitoring work			
3	Be able to prepare for a quality audit in own area of responsibility	3.1 Prepare and organise records and documentation for the quality auditor 3.2 Review previous quality audits and ensure agreed recommendations have been implemented			
4	Be able to discuss quality audit findings with the auditor	4.1 Discuss with the auditor the results of the audit and identify any areas for improvement 4.2 Agree corrective actions to remedy any identified issues, and set a date for their implementation			
5	Be able to complete agreed actions following a quality audit	5.1 Take corrective action based on quality audit findings			

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(if sampled)

Unit 100: Develop, Maintain and Review Personal Networks

Unit reference number: R/600/9587

Level: 4

Credit value: 4

Guided learning hours: 25

Unit summary

This unit helps learners to develop, maintain and review networking relationships based on personal contacts.

Assessment requirements/evidence requirements

Assessment must be carried out in way that is consistent with the requirements outlined in *Annexe D: Assessment requirements/strategy for Management and Leadership Units*. To pass the unit, learners must meet all of the assessment criteria.

Assessment methodology

This unit is assessed using evidence from the workplace, ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc.

Simulation is not allowed.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the benefits of networking and the need for data privacy	1.1 Evaluate the benefits of networking with individuals and organisations			
		1.2 Identify individuals and organisations that would provide benefits to own organisation and networks			
		1.3 Explain the need for confidentiality with networking contacts			
2	Be able to develop a personal network of contacts	2.1 Develop networks that will provide personal and organisational benefit			
		2.2 Develop guidelines for working with networks in line with organisational procedures.			
3	Be able to review networking relationships	3.1 Assess the value of own current personal network			
		3.2 Evaluate own experience with existing contacts and use these to inform future actions			

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(if sampled)

Unit 101: Develop and Evaluate Operational Plans for Own Area of Responsibility

Unit reference number: Y/600/9588

Level: 5

Credit value: 6

Guided learning hours: 25

Unit summary

This unit helps learners to develop, implement, monitor and review operational plans for own area of responsibility.

Assessment requirements/evidence requirements

Assessment must be carried out in way that is consistent with the requirements outlined in *Annexe D: Assessment requirements/strategy for Management and Leadership Units*. To pass the unit, learners must meet all of the assessment criteria.

Assessment methodology

This unit is assessed using evidence from the workplace, ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc.

Simulation is not allowed.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to align objectives of own area of responsibility with those of own organisation	1.1 Identify operational objectives within own area of responsibility 1.2 Analyse objectives of own area of responsibility in relation to those of own organisation.			
2	Be able to implement operational plans in own area of responsibility	2.1 Assess risks associated with operational plans and include contingency arrangements 2.2 Identify support from relevant stakeholders 2.3 Implement operational plan within own area of responsibility			
3	Be able to monitor and evaluate operational plans in own area of responsibility	3.1 Monitor procedures within the operational plan 3.2 Evaluate operational plans and implement any necessary actions			

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(if sampled)

Unit 102: Promote Equality of Opportunity, Diversity and Inclusion Across an Organisation

Unit reference number: T/600/9632

Level: 5

Credit value: 6

Guided learning hours: 30

Unit summary

This unit helps learners to promote and implement any change to equality, diversity and inclusion policies and procedures in own organisation.

Assessment requirements/evidence requirements

Assessment must be carried out in way that is consistent with the requirements outlined in *Annexe D: Assessment requirements/strategy for Management and Leadership Units*. To pass the unit, learners must meet all of the assessment criteria.

Assessment methodology

This unit is assessed using evidence from the workplace, ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc.

Simulation is not allowed.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to understand the benefits of an inclusive and diverse workforce	1.1 Examine the benefits of an inclusive and diverse workforce			
2	Be able to understand organisation's responsibilities under equality legislation and relevant codes of practice	2.1 Explain how legislation, equality, diversity, inclusion and relevant codes of practice apply to own organisation			
3	Be able to benchmark equality, diversity and inclusion	3.1 Explain how to benchmark to equality, diversity and inclusion in own organisation			
4	Be able to communicate equality, diversity and inclusion policy and procedures.	4.1 Communicate written equality, diversity and inclusion policy and procedures all relevant stakeholders			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
5	Be able to review effectiveness of equality, diversity and inclusion issues	5.1 Analyse effectiveness of policy and procedures for equality, diversity and inclusion issues 5.2 Implement any change to the policy and procedures			

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(if sampled)

Unit 103: Examine Staff Turnover Issues in Own Area of Responsibility

Unit reference number: A/600/9664

Level: 5

Credit value: 4

Guided learning hours: 25

Unit summary

This unit helps learners who are facing high staff turnover to examine the reasons and potential solutions to this.

Assessment requirements/evidence requirements

Assessment must be carried out in way that is consistent with the requirements outlined in *Annexe D: Assessment requirements/strategy for Management and Leadership Units*. To pass the unit, learners must meet all of the assessment criteria.

Assessment methodology

This unit is assessed using evidence from the workplace, ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc.

Simulation is not allowed.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to examine the reasons for, and impact of, staff turnover whilst maintaining confidentiality in own area of responsibility	1.1 Identify information about staff turnover 1.2 Examine the reasons for staff turnover in own area of responsibility 1.3 Analyse the impact of staff turnover on business objectives in own area of responsibility maintaining confidentiality			
2	Be able to compare staff turnover rates across organisations	2.1 Examine staff turnover rate with similar organisations 2.2 Assess staff turnover in own organisation against other organisations.			
3	Understand how to turn unexpected staffing turnover into opportunities rather than threats	3.1 Analyse unexpected staffing turnover and use research tools or techniques as appropriate			

Learner name: _____

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(if sampled)

Unit 104: Developing Collaborative Relationships with Other Organisations

Unit reference number: T/600/9694

Level: 5

Credit value: 7

Guided learning hours: 30

Unit summary

This unit will ensure that learners are able to identify, set up, maintain, review and evaluate collaborative relationships between their own and other organisations.

Assessment requirements/evidence requirements

Assessment must be carried out in way that is consistent with the requirements outlined in *Annexe D: Assessment requirements/strategy for Management and Leadership Units*. To pass the unit, learners must meet all of the assessment criteria.

Assessment methodology

This unit is assessed using evidence from the workplace, ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc
Simulation is not allowed.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to identify potential collaborative opportunities with other organisations	1.1 Identify organisations that share common or complementary objectives to own organisation 1.2 Evaluate the feasibility of collaboration with identified organisations 1.3 Evaluate the potential benefits of collaboration 1.4 Develop a business case for collaboration with identified organisations			
2	Be able to agree the strategic aims and objectives of collaboration	2.1 Agree the strategic aims and objectives of collaboration internally and with other organisations 2.2 Agree the benefits each organisation expects to receive from collaboration			
3	Be able to agree methods and expected outcomes of collaboration	3.1 Agree the actions each organisation will take and when 3.2 Agree the expected outcomes of collaboration 3.3 Agree arrangements for communication 3.4 Agree process of collaboration review			
4	Be able to instigate and sustain a collaborative relationship with another organisation	4.1 Implement agreed actions at agreed times 4.2 Maintain communication and provide support to other organisations			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
5	Be able to review and evaluate the collaboration with another organisation	5.1			
		5.2			
		5.3			

Learner name: _____

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(if sampled)

Unit 105: Review and Re-Engineer Customer Service Processes

Unit reference number: R/601/1601

Level: 4

Credit value: 11

Guided learning hours: 47

Unit summary

From time to time, a customer process must be subject to review. Most of all, this is because both customer expectations and the general environment change. In addition to this, features of the process evolve as it is operated and the customer service purpose of various details can be lost. This unit is about a systematic approach to reviewing and re-engineering a customer service process. The review seeks a balance of customer satisfaction, cost awareness and compliance with regulation. The review must be undertaken with the agreement and support of those with authority to make changes. It must also take account of the views of those who deliver the process and are in direct contact with customers. This unit is for the learner if they are responsible for reviewing customer service processes. Do not use this unit if the learner does not hold that responsibility and does not have the support of those with authority to make changes

Assessment requirements/evidence requirements

- 1 The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this unit. Simulation is not allowed for any performance evidence within this unit
- 2 The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation
- 3 The learner must provide evidence that shows they have done this over a sufficient period of time for their assessor to be confident that they are competent

- 4 The 'appropriate people' with whom the learner agrees the boundaries of the customer service process to be reviewed must include one or more of the following:
 - 1 people in other departments or sections of the organisation
 - 2 internal customers
 - 3 external customers
 - 4 internal suppliers
 - 5 service partners
 - 6 service delivery colleagues
 - 7 line managers
- 5 The learner's plan for implementing agreed recommendations may be formal or informal

Assessment methodology

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Scope the customer service processes to be reviewed	<p>1.1 Define the boundaries of a customer service process</p> <p>1.2 Agree with the appropriate people the boundaries of the customer service process to be reviewed</p> <p>1.3 Set parameters for the types of change that might be made during the re-engineering</p> <p>1.4 Communicate with everybody involved regarding the aims of the review</p>			
2	Analyse the customer service process and identify improvement opportunities	<p>2.1 Identify all the key steps in the customer service process</p> <p>2.2 Analyse each step in the customer service process in fine detail</p> <p>2.3 Assess each step in the customer service process with reference to customer satisfaction, costs and compliance with relevant regulation</p> <p>2.4 Raise questions about each step in the current process to establish where there is scope for development and improvement</p> <p>2.5 Explore all the questions raised with those involved in the process and their managers</p> <p>2.6 Identify options for re-engineering improvements that deserve further investigation</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Evaluate improvement options and re-engineer service processes	3.1 Evaluate each option for re-engineering improvements that deserve further investigation			
		3.2. Make and agree recommendations regarding each option that has been evaluated for re-engineering the customer service process			
		3.3 Plan the implementation of agreed recommendations for re-engineering the customer service process			
		3.4 Implement re-engineering of the customer service process			
		3.5 Monitor the results of implementing re-engineering of the customer service process			
4	Understand how to review and re-engineer customer service processes	4.1 explain ways to establish boundaries around a customer service process to be re-engineered			
		4.2 describe who needs to be involved in the re-engineering process to ensure that the recommendations can be seen through			
		4.3 explain the importance of communicating with those involved in service delivery when re-engineering the process			
		4.4 review ways to analyse and assess the effectiveness of separate steps in the customer service process			
		4.5 explain the importance of identifying the right questions to challenge existing customer service processes appropriately			

	4.6	describe techniques for implementing changes in customer service processes			
	4.7	explain the importance of monitoring the effects of customer service process changes			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 106: Implement Quality Improvements to Customer Service

Unit reference number: L/601/1578

Level: 4

Credit value: 10

Guided learning hours: 67

Unit summary

Introducing quality improvements to customer service requires careful management of change. This unit covers the detailed planning of customer service improvements, managing the changes that need to take place to implement the improvements, and then evaluating the results. It includes the consultation and communication processes that are vital to the successful implementation of improvements and management of change. In particular it is vital to involve customers at all stages of the quality improvement process

Assessment requirements/evidence requirements

- 1 The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this unit. Simulation is not allowed for any performance evidence within this unit.
- 2 The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 The learner must provide evidence that shows they have done this over a sufficient period of time for their assessor to be confident that they are competent.
- 4 The learner's evidence must include planning for and using the following resources when implementing improvements to customer service:
 - 1 time
 - 2 human resources
 - 3 physical resources
 - 4 financial resources

- 5 The learner must provide evidence of communicating with:
 - 1 customers
 - 2 front-line staff
 - 3 colleagues
 - 4 supervisors/team leaders
 - 5 e senior managers
 - 6 service partners
- 6 The learner's communication may be face to face, in writing, by telephone, text message, email, internet (including social networking), intranet or by any other method they would be expected to use within their job role.
- 7 The learner must include evidence of collecting, analysing and using information that is:
 - 1 quantitative
 - 2 qualitative

Assessment methodology

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Plan the introduction of customer service improvements	1.1 Identify possible customer service improvements and the resources available to implement them			
		1.2 Evaluate factors that may help or hinder the introduction of change			
		1.3 Develop realistic objectives, tasks and schedules for the introduction of improvements and agree them with colleagues			
		1.4 Assess the risks associated with each action to effect change			
		1.5 Plan how they will evaluate the proposed improvements			
2	Manage the implementation of customer service improvements	2.1 Inform the people who will be affected by change, win their support and keep them informed of progress			
		2.2 Implement their plans for improvements dealing effectively with any difficulties			
		2.3 Provide the necessary support to all their colleagues who are involved with changes and improvements			
		2.4 Ensure that the planned improvements are implemented on time and within budget			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Monitor and evaluate customer service improvements	3.1 Monitor and evaluate the impact that the changes are having on the quality of customer service			
		3.2 Identify and recommend any further changes that may be necessary to achieve the planned aims and objectives of the improvements			
		3.3 Identify any lessons from the change process and note these for future activities			
4	Understand how to implement quality improvements to customer service	4.1 Explain the importance of careful planning when introducing change			
		4.2 Evaluate the types of factors that may help or hinder the process of change and how to identify and plan for these			
		4.3 Describe how to develop plans that contain realistic objectives, tasks and schedules			
		4.4 Explain the importance of having clear lines of responsibility and accountability			
		4.5 Explain how to identify and plan for possible contingencies			
		4.6 Describe the importance of clear communication when changes are taking place			
		4.7 Explain why it is important to win the support of people who will be affected by change			
		4.8 Describe how to win over staff who are resistant to change			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>4.9 Describe the types of support that staff may need when improvements are being implemented and how to provide such support</p> <p>4.10 Explain why it is important to complete change on time and within budget</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 107: Apply Technology or Other Resources to Improve Customer Service

Unit reference number: Y/601/1597

Level: 4

Credit value: 11

Guided learning hours: 73

Unit summary

Customer service changes and improves sometimes through the application of technology or other resources as much as through changes in behaviour of those delivering the service. Whilst these changes can bring real benefits they inevitably come at an initial cost which must be taken into consideration. This unit is about the process of managing the application of technology or other resources to a customer service process. It involves a systematic approach to considering and evaluating options, implementing the most appropriate and reviewing the results.

Assessment requirements/evidence requirements

- 1 The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this unit. Simulation is not allowed for any performance evidence within this unit.
- 2 The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 The learner must provide evidence that shows they have done this over a sufficient period of time for their assessor to be confident that they are competent.
- 4 The technology used in the learner's evidence may be electronic or non electronic
- 5 The costs the learner establishes for each option for improving customer service must be financial.
- 6 The business case the learner plans for applying technology or other resources to improve customer service may be formal or informal.
- 7 The learner's review of the implementation of customer service improvements may be formal or informal.

Assessment methodology

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Identify and specify opportunities for customer service improvement	<p>1.1 Monitor developments in technology and the use of other resources to improve customer service</p> <p>1.2 Review customer service delivery systems with specific reference to use of resources and technology</p> <p>1.3 Identify opportunities and options for improving customer service by applying technology or other resources</p> <p>1.4 Analyse the customer service benefits that could result from options for improvement</p> <p>1.5 Specify the changes in technology or other resources needed to deliver the options</p>			
2	Evaluate options for applying technology or other resources to improve customer service	<p>2.1 Identify the options for improving customer service with the application of technology or other resources</p> <p>2.2 Establish the costs associated with each option for improving customer service</p> <p>2.3 List and where possible quantify the benefits from each option for improving customer service</p> <p>2.4 Estimate the affordability of each option to improve customer service</p> <p>2.5 Recommend the most appropriate options for implementation</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		2.6 Identify the probable effects of any recommended changes on their organisation's service offer and customer perceptions			
		2.7 Plan a business case to support their recommendations for improvements through application of technology or other resources			
3	Oversee the implementation of resource changes to improve customer service	3.1 Plan implementation using details of agreed developments to improve customer service 3.2 Brief colleagues about the implementation of customer service improvements and the expected benefits 3.3 Monitor implementation of customer service improvements and the expected benefits 3.4 Review implementation of customer service improvements with colleagues 3.5 Make appropriate adjustments to implementation of customer service improvements as a result of review			
4	Understand how to apply technology or other resources to improve customer service	4.1 describe features and functionality of available technology that may contribute to improvements in customer service 4.2 evaluate how the application of additional resources other than technology can be used to improve customer service 4.3 describe methods for the systematic review of customer service systems			

	4.4	explain techniques to analyse the costs and benefits of options for improving customer service			
	4.5	describe methods for presenting a business case for applying technology or other resources to make improvements in customer service			
	4.6	explain briefing techniques for introducing colleagues to changes			
	4.7	describe ways to review and adjust customer service delivery after the implementation of changes			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Further information

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

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

Key publications

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

All of these publications are available on our website:
qualifications.pearson.com

Further information and publications on the delivery and quality assurance of NVQ/Competence-based qualifications are available at our website on the Delivering BTEC pages. Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please go to the resources page of our website.

How to obtain National Occupational Standards:

go to www.cfa.uk.com

Professional development and training

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

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

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

The national programme of training we offer can be viewed on our website (<http://qualifications.pearson.com/en/support/training-from-pearson-uk.html#step1>). You can request customised training through the website or by contacting one of our advisers in the Training from Pearson team via Customer Services to discuss your training needs.

The training we provide:

- is active
- is designed to be supportive and thought provoking
- builds on best practice
- may be suitable for those seeking evidence for their continuing professional development.

Contact us

We have a dedicated Account Support team, across the UK, to give you more personalised support and advice. To contact your Account Specialist:

Email: wblcustomerservices@pearson.com
Telephone: 0844 576 0045

If you are new to Pearson and would like to become an approved centre, please contact us by:

Email: wbl@pearson.com
Telephone: 0844 576 0045

Annexe A: Quality assurance

Key principles of quality assurance

- A centre delivering Pearson qualifications must be a Pearson recognised centre and must have approval for qualifications that it is offering.
- The centre agrees, as part of gaining recognition, to abide by specific terms and conditions relating to the effective delivery and quality assurance of assessment. The centre must abide by these conditions throughout the period of delivery.
- Pearson makes available to approved centres a range of materials and opportunities to exemplify the processes required for effective assessment and provide examples of effective standards. Approved centres must use the guidance on assessment to ensure that staff who are delivering Pearson qualifications are applying consistent standards.
- An approved centre must follow agreed protocols for: standardisation of assessors; planning, monitoring and recording of assessment processes; internal verification and recording of internal verification processes and dealing with special circumstances, appeals and malpractice.

Quality assurance processes

The approach to quality assured assessment is made through a partnership between a recognised centre and Pearson. Pearson is committed to ensuring that it follows best practice and employs appropriate technology to support quality assurance processes where practicable. The specific arrangements for working with centres will vary. Pearson seeks to ensure that the quality assurance processes it uses do not inflict undue bureaucratic processes on centres, and works to support them in providing robust quality assurance processes.

The learning outcomes and assessment criteria in each unit within this specification set out the standard to be achieved by each learner in order to gain each qualification. Pearson operates a quality-assurance process, designed to ensure that these standards are maintained by all assessors and verifiers.

For the purposes of quality assurance, all individual qualifications and units are considered as a whole. Centres offering these qualifications must be committed to ensuring the quality of the units and qualifications they offer, through effective standardisation of assessors and internal verification of assessor decisions. Centre quality assurance and assessment processes are monitored by Pearson.

The Pearson quality-assurance processes will involve:

- gaining centre recognition and qualification approval if a centre is not currently approved to offer Pearson qualifications
- annual visits to centres by Pearson for quality review and development of overarching processes and quality standards. Quality review and development visits will be conducted by a Pearson quality development reviewer
- annual visits by occupationally competent and qualified Pearson Standards Verifiers for sampling of internal verification and assessor decisions for the occupational sector
- the provision of support, advice and guidance towards the achievement of National Occupational Standards.

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

Annexe B: Centre certification and registration

Pearson Standards Verifiers will provide support, advice and guidance to centres to achieve Direct Claims Status (DCS). Pearson will maintain the integrity of Pearson NVQs/competence qualifications through ensuring that their awarding is secure. Where there are quality issues identified in the delivery of programmes, Pearson will exercise the right to:

- direct centres to take action
- limit or suspend certification
- suspend registration.

The approach of Pearson in such circumstances is to work with the centre to overcome the problems identified. If additional training is required, Pearson will aim to secure the appropriate expertise to provide this.

What are the access arrangements and special considerations for the qualifications in this specification?

Centres are required to recruit learners to Pearson qualifications with integrity.

Appropriate steps should be taken to assess each applicant's potential and a professional judgement should be made about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Pearson's policy on learners with particular requirements.

Pearson's policy on access arrangements and special considerations for Pearson qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the 2010 Equality Act) without compromising the assessment of skills, knowledge, understanding or competence. Please refer to *Access Arrangements and Special Considerations for BTEC and Edexcel NVQ Qualifications* for further details. qualifications.pearsons.com

Annexe C: Assessment strategy

1 Introduction

- 1.1 The Contact Centre Operations Assessment Strategy is designed to provide awarding organisations/bodies with a robust and flexible approach to deliver assessment for Contact Centre NVQs/SVQs and competence-based qualifications.

2 External quality control

- 2.1 Awarding organisations/bodies will provide qualifications and quality assurance that support their delivery to all Contact Centre Operations NVQs/SVQs and competence-based qualification assessment centres in line with regulatory requirements in England, Scotland, Wales and Northern Ireland.
- 2.2 Awarding organisations/bodies will carry out standard risk assessments in each Contact Centre Operations NVQ / SVQ and competence based qualification assessment centre and manage all identified risks appropriately.
- 2.3 Awarding organisations will consistently apply external verification processes at all Contact Centre Operations NVQ / SVQ and competence-based qualification assessment centres, underpinned by standard risk assessment and risk management processes.
- 2.4 Awarding organisations/bodies will supply the CfA: Business Skills @ Work (CfA) with quarterly reports on:
- registration and achievement data at qualification level, and unit level where available

3 Assessing performance

- 3.1 Assessment of all Units and Levels of Contact Centre Operations NVQs /SVQs may be based on candidate performance at work or in a real work environment.
- 3.2 If deemed necessary the Level 1 NVQ/SVQ Award in Contact Centre Operations can be assessed in a realistic working environment (see 4. below)
- 3.3 Units which have been imported by the CfA in their Contact Centre Operations NVQs/SVQs will be assessed in compliance with the imported assessment strategies.

4 Realistic working Environment for NVQ/SVQ units

- 4.1 Only the Level 1 NVQ/SVQ Award in Contact Centres can be assessed in a realistic working environment.
- 4.2 Awarding organisations will provide guidance for centres on RWEs. Awarding organisations will make sure RWEs, “provide an environment which replicates the key characteristics of the workplace in which the skill to be assessed is normally employed”.

5 Occupational expertise to assess performance, and moderate and verify assessments

5.1 Candidates work achievements must be assessed, moderated or verified at work by:

- a **Assessors, moderators or verifiers** who have achieved, or are working towards achievement of, the appropriate regulatory body approved qualifications for assessment, moderation or verification;

OR

- b A **trainer, supervisor or manager**, elected by an employer, who must either:

- 1 Have achieved, or be working towards achieving, appropriate regulatory body approved unit qualifications for assessment, moderation or verification;

OR

- 2 Seek guidance and approval from their awarding organisation to demonstrate that the:

- Organisation has appropriate processes in place to facilitate assessment, moderation or verification functions
- Trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100% to the National Occupational Standards upon which the qualifications above are based. This is known as the employer direct model.

5.2 **Assessors** must be occupationally competent to make Contact Centre Operations assessment judgements about the level and scope of individual candidate performance at work; and occupationally competent to make assessment judgements about the quality of assessment and the assessment process.

5.3 **External Moderators / Verifiers or Internal Moderators / Verifiers** must be occupationally competent to make Contact Centre Operations moderation and verification judgements about the quality of assessment and the assessment process.

5.4 Awarding organisations/bodies will supply information on the requirements for internal and external moderation/verification activities to Contact Centre assessment centres.

5.5 The CfA and awarding organisations/bodies require all assessors, moderators and verifiers to have a sound knowledge and understanding of Contact Centre competence to deliver these functions. The CfA recognises this can be achieved in many ways but must be recorded in individual continual professional development (CPD) records that are maintained in Contact Centre Operations assessment centres.

Assessment requirements/strategy for Management and Leadership Units 98-104

Management Standards Centre – MSC

Assessment Strategy for Management and Leadership

Scottish Vocational Qualifications (SVQs) and National Vocational Qualifications (QCF) and Units

The Management Standards Centre (MSC) is the Government recognised standards setting body for management and leadership. This document sets out the overarching assessment strategy for National Vocational Qualifications QCF and related Units and Scottish Vocational Qualifications (SVQs) in management and leadership based on the National Occupational Standards (NOS) for management and leadership.

1 Achieving External Quality Control of Assessment

The following measures are proposed in terms of achieving external quality control of assessment:

- Application of **risk management**. The MSC will expect awarding bodies to apply such risk management systems to the awarding of NVQs and SVQs in management and leadership and deploy resources accordingly to tackle identified risks.
- The existing **Management and Leadership Qualifications Forum (M&LQF)** will take on a more active role in relation to the ongoing assessment and quality assurance of NVQs and SVQs in management and leadership
- MSC encourages **Standardisation activities/exercises** across centres (assessors and internal verifiers) and external verifiers where appropriate.

2 Assessment through Performance in the Workplace

The NVQs and SVQs in management and leadership are to be assessed using evidence from the workplace ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc.

3 Assessment by Simulation

Simulation is not allowed.

4 Requirements for Assessors and Verifiers

Assessors and Verifiers must demonstrate that they:

- have credible expertise in management and leadership relevant to the level(s)/units they are assessing or verifying.
- keep themselves up-to-date with developments in management and leadership practice;
- have a thorough understanding of the NOS for management and leadership at the unit(s)/level(s) they are assessing or verifying.

In addition Assessors and Verifiers must have:

- An accredited assessor and/or verifier qualification, or
- A related qualification in assessment and/or verification that has been mapped to the national Occupational Standards for assessment and/or verifications, or
- Evidence of undertaking an employer assessment programme that has been mapped to the national Occupational Standards for assessment and/or verifications. MSC will work with Awarding Bodies through the Awarding Body forum to ensure that there is effective development and management through the QCF process.

Annexe D - Equality Impact Assessment form

(If existing unit) Unit Code	Unit Title	LO/AC	Perceived Barrier or Difficulty	Affected Characteristic	Is Adjustment Possible?	Detail of Possible Adjustment	Other Comments
T/503/0342	Improve Personal Effectiveness at Work in a Contact Centre	-	This is a level 2 mandatory unit in a level one qualification accounting for two thirds of the mandatory credits to be achieved.	-	No	N/A	Centres should be advised that this unit could potentially create a barrier for level one learners taking this qualification.

March 2017

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