Specification

Edexcel Level 1 NVQ Certificate in Customer Service (QCF)

Edexcel Level 2 NVQ Certificate in Customer Service (QCF)

Edexcel Level 3 NVQ Diploma in Customer Service (QCF)

Edexcel Level 4 NVQ Diploma in Customer Service (QCF)

For first registration September 2010

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Edexcel, a Pearson company, is the UK's largest awarding organisation offering vocational and academic qualifications and testing, to employers, training providers, colleges, schools, and other places of learning in the UK, and in over 85 countries worldwide.

Our specialist suite of qualifications include NVQs, Apprenticeships, WorkSkills, Functional Skills, Foundation Learning, as well as our exclusive range of BTECs, from entry level right through to Higher National Diplomas.

Contents

Qualification titles covered by this specification

This specification gives you the information you need to offer the Edexcel Level 1 and 2 NVQ Certificates and Edexcel Level 3 and 4 NVQ Diplomas in Customer Service (QCF):

Qualification title	Qualification Accreditation Number (QAN)	Accreditation start date
Edexcel Level 1 NVQ Certificate in Customer Service (QCF)	500/9994/2	01/08/2010
Edexcel Level 2 NVQ Certificate in Customer Service (QCF)	501/0080/4	01/08/2010
Edexcel Level 3 NVQ Diploma in Customer Service (QCF)	500/9505/5	01/08/2010
Edexcel Level 4 NVQ Diploma in Customer Service (QCF)	500/9506/7	01/08/2010

These qualifications have been accredited within the Qualifications and Credit Framework (QCF) and are eligible for public funding as determined by the Department for Education (DfE) under Sections 96 and 97 of the Learning and Skills Act 2000.

The qualification titles listed above feature in the funding lists published annually by the DfE and the regularly updated website. They will also appear on the Learning Aims Database (LAD), where relevant.

You should use the QCF Qualification Accreditation Number (QAN), when you wish to seek public funding for your learners. Each unit within a qualification will also have a unique QCF reference number, which is listed in this specification.

The QCF 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 Edexcel.

These titles replace the following qualifications from 1 August 2010:

Qualification title	Qualification Accreditation Number (QAN)	Accreditation start date	Accreditation end date
Edexcel Level 1 NVQ in Customer Service	500/3622/1	01/02/2008	31/08/2010
Edexcel Level 2 NVQ in Customer Service	100/6088/1	01/07/2006	31/07/2010
Edexcel Level 3 NVQ in Customer Service	100/6089/3	01/08/2006	31/07/2010
Edexcel Level 4 NVQ in Customer Service	100/6090/X	01/07/2006	31/07/2010

Key features of the Level 1 and 2 NVQ Certificates and Level 3 and 4 NVQ Diplomas in Customer Service (QCF)

These qualifications:

- are nationally recognised

- are based on the Customer Service National Occupational Standards (NOS). The NOS, assessment strategy and qualification structures are owned by the Council for Administration (CfA).

The Edexcel Level 2 NVQ Certificate in Customer Service and the Edexcel Level 3 NVQ Diploma in Customer Service have been approved as components required for the Customer Service Apprenticeship framework.

What is the purpose of these qualifications?

These qualifications comprise QCF credit-rated units developed by the Institute of Customer Service, the Standards Setting Body for the Customer Service sector. These qualifications allow learners to apply knowledge, understanding and skills to a national occupation level required by employers, thus proving competency in their job role.

Who are these qualifications for?

These qualifications are for all learners aged 16 and above who are capable of reaching the required standards. The Edexcel Level 1 NVQ Certificate in Customer Service is for learners aged 14 and above who are capable of reaching the required standards.

Edexcel'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 qualifications.

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

These qualifications require individuals to demonstrate competence against National Occupational Standards (NOS) which are based on the needs of the Customer Service sector as defined by the Sector Skills Council. As such they contribute to the development of skilled labour in the sector. The Edexcel Level 2 NVQ Certificate and the Edexcel Level 3 NVQ Diploma in Customer Service may contribute towards the competence element of an Apprenticeship.

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

- Bank/building society customer adviser
- Contact centre operator
- Customer service adviser (Post Office)
- Customer service assistant/manager
- Hotel receptionist
- Local government customer services officer
- Medical receptionist

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

Learners can progress from the Edexcel Level 1 NVQ Certificate in Customer Service (QCF) onto the Edexcel Level 2 NVQ Certificate in Customer Service (QCF), employment, or additional related qualifications.

Learners can progress from the Edexcel Level 2 NVQ Certificate in Customer Service (QCF) onto the Edexcel Level 3 NVQ Diploma in Customer Service (QCF), employment, or additional related qualifications.

Learners can progress from the Edexcel Level 3 NVQ Diploma in Customer Service (QCF) onto the Edexcel Level 4 NVQ Diploma in Customer Service (QCF), employment, or additional related qualifications.

Learners can progress from the Edexcel Level 4 NVQ Diploma in Customer Service (QCF) into employment or additional related qualifications.

Further information is available in *Annexe A*.

What is the qualification structure for the Level 1 NVQ Certificate in Customer Service (QCF)?

Individual units can be found in the *Units* section. The QCF level and credit value are given on the first page of each unit.

Qualification structure summary

Learners must achieve all 8 credits from the two mandatory units. A further 14 credits must be achieved by completing a minimum of one unit from each of the three option groups; at least 8 of these 14 credits must be at Level 1.

A minimum of 22 credits are required overall for completion of this qualification.

Qualification structure

Edexcel Level 1 NVQ Certificate in Customer Service (QCF)			
Unit reference	**Mandatory units (Customer Service Foundations)**	**Credit**	**Level**
F/601/1609	Unit 1: Communicate using customer service language	4	1
L/601/1614	Unit 2: Follow the rules to deliver customer service	4	2
Unit reference	**Option Group A (Impression and Image)**	**Credit**	**Level**
R/601/1209	Unit 7: Maintain a positive and customer-friendly attitude	5	1
L/601/1211	Unit 8: Adapt your behaviour to give a good customer service impression	5	1
R/601/1212	Unit 9: Communicate effectively with customers	5	2
L/601/0933	Unit 10: Give customers a positive impression of yourself and your organisation	5	2
D/601/0936	Unit 11: Promote additional services or products to customers	6	2
H/601/1215	Unit 12: Process information about customers	5	2
M/601/1217	Unit 13: Live up to the customer service promise	6	2

Unit reference	Option Group A (Impression and Image)	Credit	Level
T/601/1218	Unit 14: Make customer service personal	6	2
M/601/1220	Unit 15: Go the extra mile in customer service	6	2
T/601/1221	Unit 16: Deal with customers face to face	5	2
F/601/1223	Unit 17: Deal with incoming telephone calls from customers	5	2
J/601/1224	Unit 18: Make telephone calls to customers	6	2
Unit reference	Option Group B (Delivery)	Credit	Level
A/601/1205	Unit 25: Do your job in a customer friendly way	5	1
J/601/1210	Unit 26: Deliver reliable customer service	5	2
Y/601/1213	Unit 27: Deliver customer service on your customer's premises	5	2
K/601/1216	Unit 28: Recognise diversity when delivering customer service	5	2
A/601/1219	Unit 29: Deal with customers across a language divide	8	2
A/601/1222	Unit 30: Use questioning techniques when delivering customer service	4	2
L/601/1225	Unit 31: Deal with customers using bespoke software	5	2
Y/601/1227	Unit 32: Maintain customer service through effective handover	4	2
Unit reference	Option Group C (Handling Problems)	Credit	Level
M/601/1508	Unit 41: Recognise and deal with customer queries, requests and problems	5	1
T/601/1509	Unit 42: Take details of customer service problems	4	1
M/601/1511	Unit 43: Resolve customer service problems	6	2
T/601/1512	Unit 44: Deliver customer service to difficult customers	6	2

What is the qualification structure for the Level 2 NVQ Certificate in Customer Service (QCF)?

Individual units can be found in the *Units* section. The QCF level and credit value are given on the first page of each unit.

Qualification structure summary

Learners must achieve all 8 credits from the two mandatory units. A further 20 credits must be achieved by completing a minimum of one unit from each of the four option groups; at least 11 of these 20 credits must be at Level 2.

A minimum of 28 credits are required overall for completion of this qualification.

Qualification structure

Edexcel Level 2 NVQ Certificate in Customer Service (QCF)			
Unit reference	**Mandatory units (Customer Service Foundations)**	**Credit**	**Level**
F/601/1609	Unit 1: Communicate using customer service language	4	1
L/601/1614	Unit 2: Follow the rules to deliver customer service	4	2
Unit reference	**Option Group A (Impression and Image)**	**Credit**	**Level**
R/601/1209	Unit 7: Maintain a positive and customer-friendly attitude	5	1
L/601/1211	Unit 8: Adapt your behaviour to give a good customer service impression	5	1
R/601/1212	Unit 9: Communicate effectively with customers	5	2
L/601/0933	Unit 10: Give customers a positive impression of yourself and your organisation	5	2
D/601/0936	Unit 11: Promote additional services or products to customers	6	2
H/601/1215	Unit 12: Process information about customers	5	2
M/601/1217	Unit 13: Live up to the customer service promise	6	2

Unit reference	Option Group A (Impression and Image)	Credit	Level
T/601/1218	Unit 14: Make customer service personal	6	2
M/601/1220	Unit 15: Go the extra mile in customer service	6	2
T/601/1221	Unit 16: Deal with customers face to face	5	2
F/601/1223	Unit 17: Deal with incoming telephone calls from customers	5	2
J/601/1224	Unit 18: Make telephone calls to customers	6	2
R/601/1226	Unit 19: Deal with customers in writing or electronically	6	3
D/601/1228	Unit 20: Use customer service as a competitive tool	8	3
D/601/1231	Unit 21: Organise the promotion of additional services or products to customers	7	3
K/601/1233	Unit 22: Build a customer service knowledge set	7	3
Unit reference	Option Group B (Delivery)	Credit	Level
A/601/1205	Unit 25: Do your job in a customer friendly way	5	1
J/601/1210	Unit 26: Deliver reliable customer service	5	2
Y/601/1213	Unit 27: Deliver customer service on your customer's premises	5	2
K/601/1216	Unit 28: Recognise diversity when delivering customer service	5	2
A/601/1219	Unit 29: Deal with customers across a language divide	8	2
A/601/1222	Unit 30: Use questioning techniques when delivering customer service	4	2
L/601/1225	Unit 31: Deal with customers using bespoke software	5	2
Y/601/1227	Unit 32: Maintain customer service through effective handover	4	2
H/601/1229	Unit 33: Deliver customer service using service partnerships	6	3
Y/601/1230	Unit 34: Organise the delivery of reliable customer service	6	3
H/601/1232	Unit 35: Improve the customer relationship	7	3

Unit reference	Optional Group C (Handling Problems)	Credit	Level
M/601/1508	Unit 41: Recognise and deal with customer queries, requests and problems	5	1
T/601/1509	Unit 42: Take details of customer service problems	4	1
M/601/1511	Unit 43: Resolve customer service problems	6	2
T/601/1512	Unit 44: Deliver customer service to difficult customers	6	2
J/601/1515	Unit 45: Monitor and solve customer service problems	6	3
D/601/1519	Unit 46: Apply risk assessment to customer service	10	3
D/601/1522	Unit 47: Process customer service complaints	6	3
Unit reference	Option Group D (Development and Improvement)	Credit	Level
T/601/1526	Unit 49: Develop customer relationships	6	2
A/601/1530	Unit 50: Support customer service improvements	5	2
R/601/1534	Unit 51: Develop personal performance through delivering customer service	6	2
H/601/1540	Unit 52: Support customers using on-line customer services	5	2
M/601/1542	Unit 53: Buddy a colleague to develop their customer service skills	5	2
R/601/1548	Unit 54: Develop your own customer service skills through self-study	6	2
Y/601/1549	Unit 55: Support customers using self-service technology	5	2
D/601/1553	Unit 56: Work with others to improve customer service	8	3
H/601/1554	Unit 57: Promote continuous improvements	7	3
K/601/1555	Unit 58: Develop your own and others' customer service skills	8	3
H/601/1568	Unit 59: Lead a team to improve customer service	7	3
H/601/1571	Unit 60: Gather, analyse and interpret customer feedback	10	3
T/601/1574	Unit 61: Monitor the quality of customer service transactions	7	3

What is the qualification structure for the Level 3 NVQ Diploma in Customer Service (QCF)?

Individual units can be found in the *Units* section. The QCF level and credit value are given on the first page of each unit.

Qualification structure summary

Learners must achieve all 12 credits from the two mandatory units. A further 30 credits must be achieved by completing a minimum of one unit from each of the four option groups; at least 10 of these 30 credits must be at Level 3.

A minimum of 42 credits are required overall for completion of this qualification.

Qualification structure

Edexcel Level 3 NVQ Diploma in Customer Service (QCF)			
Unit reference	**Mandatory units (Customer Service Foundations)**	**Credit**	**Level**
K/601/1622	Unit 3: Demonstrate understanding of customer service	6	3
J/601/1627	Unit 4: Demonstrate understanding of the rules that impact on improvements in customer service	6	3
Unit reference	**Option Group A (Impression and Image)**	**Credit**	**Level**
R/601/1212	Unit 9: Communicate effectively with customers	5	2
L/601/0933	Unit 10: Give customers a positive impression of yourself and your organisation	5	2
D/601/0936	Unit 11: Promote additional services or products to customers	6	2
H/601/1215	Unit 12: Process information about customers	5	2
M/601/1217	Unit 13: Live up to the customer service promise	6	2
T/601/1218	Unit 14: Make customer service personal	6	2
M/601/1220	Unit 15: Go the extra mile in customer service	6	2
T/601/1221	Unit 16: Deal with customers face to face	5	2

Unit reference	Option Group A (Impression and Image)	Credit	Level
F/601/1223	Unit 17: Deal with incoming telephone calls from customers	5	2
J/601/1224	Unit 18: Make telephone calls to customers	6	2
R/601/1226	Unit 19: Deal with customers in writing or electronically	6	3
D/601/1228	Unit 20: Use customer service as a competitive tool	8	3
D/601/1231	Unit 21: Organise the promotion of additional services or products to customers	7	3
K/601/1233	Unit 22: Build a customer service knowledge set	7	3
T/601/1235	Unit 23: Champion customer service	10	4
F/601/1237	Unit 24: Make customer service environmentally friendly and sustainable	11	4
Unit reference	Option Group B (Delivery)	Credit	Level
J/601/1210	Unit 26: Deliver reliable customer service	5	2
Y/601/1213	Unit 27: Deliver customer service on your customer's premises	5	2
K/601/1216	Unit 28: Recognise diversity when delivering customer service	5	2
A/601/1219	Unit 29: Deal with customers across a language divide	8	2
A/601/1222	Unit 30: Use questioning techniques when delivering customer service	4	2
L/601/1225	Unit 31: Deal with customers using bespoke software	5	2
Y/601/1227	Unit 32: Maintain customer service through effective handover	4	2
H/601/1229	Unit 33: Deliver customer service using service partnerships	6	3
Y/601/1230	Unit 34: Organise the delivery of reliable customer service	6	3
H/601/1232	Unit 35: Improve the customer relationship	7	3

Unit reference	Option Group B (Delivery)	Credit	Level
M/601/1234	Unit 36: Maintain and develop a healthy and safe customer service environment	8	4
A/601/1236	Unit 37: Plan, organise and control customer service operations	10	4
J/601/1238	Unit 38: Review the quality of customer service	8	4
L/601/1239	Unit 39: Build and maintain effective customer relations	8	4
F/601/1240	Unit 40: Deliver seamless customer service with a team	8	4
Unit reference	Option Group C (Handling Problems)	Credit	Level
M/601/1511	Unit 43: Resolve customer service problems	6	2
T/601/1512	Unit 44: Deliver customer service to difficult customers	6	2
J/601/1515	Unit 45: Monitor and solve customer service problems	6	3
D/601/1519	Unit 46: Apply risk assessment to customer service	10	3
D/601/1522	Unit 47: Process customer service complaints	6	3
K/601/1524	Unit 48: Handle referred customer complaints	10	4

Unit reference	Option Group D (Development and Improvement)	Credit	Level
T/601/1526	Unit 49: Develop customer relationships	6	2
A/601/1530	Unit 50: Support customer service improvements	5	2
R/601/1534	Unit 51: Develop personal performance through delivering customer service	6	2
H/601/1540	Unit 52: Support customers using on-line customer services	5	2
M/601/1542	Unit 53: Buddy a colleague to develop their customer service skills	5	2
R/601/1548	Unit 54: Develop your own customer service skills through self-study	6	2
Y/601/1549	Unit 55: Support customers using self-service technology	5	2
D/601/1553	Unit 56: Work with others to improve customer service	8	3
H/601/1554	Unit 57: Promote continuous improvement	7	3
K/601/1555	Unit 58: Develop your own and others' customer service skills	8	3
H/601/1568	Unit 59: Lead a team to improve customer service	7	3
H/601/1571	Unit 60: Gather, analyse and interpret customer feedback	10	3
T/601/1574	Unit 61: Monitor the quality of customer service transactions	7	3
L/601/1578	Unit 62: Implement quality improvements to customer service	10	4
L/601/1581	Unit 63: Plan and organise the development of customer service staff	9	4
M/601/1587	Unit 64: Develop a customer service strategy for a part of an organisation	11	4
A/601/1592	Unit 65: Manage a customer service award programme	7	4
Y/601/1597	Unit 66: Apply technology or other resources to improve customer service	11	4
R/601/1601	Unit 67: Review and re-engineer customer service processes	11	4
K/601/1605	Unit 68: Manage customer service performance	7	4

What is the qualification structure for the Level 4 NVQ Diploma in Customer Service (QCF)?

Individual units can be found in the *Units* section. The QCF level and credit value are given on the first page of each unit.

Qualification structure summary

Learners must achieve all 20 credits from the two mandatory units. A further 47 credits must be achieved by completing a minimum of one unit from each of the four option groups; at least 15 of these 47 credits must be at Level 4.

A minimum of 67 credits are required overall for completion of this qualification.

Qualification structure

Edexcel Level 4 NVQ Diploma in Customer Service (QCF)			
Unit reference	**Mandatory units (Customer Service Foundations)**	**Credit**	**Level**
J/601/1630	Unit 5: Demonstrate understanding of customer service management	10	4
D/601/1634	Unit 6: Follow organisational rules, legislation and external regulations when managing customer service	10	4
Unit reference	**Option Group A (Impression and Image)**	**Credit**	**Level**
R/601/1226	Unit 19: Deal with customers in writing or electronically	6	3
D/601/1228	Unit 20: Use customer service as a competitive tool	8	3
D/601/1231	Unit 21: Organise the promotion of additional services or products to customers	7	3
K/601/1233	Unit 22: Build a customer service knowledge set	7	3
T/601/1235	Unit 23: Champion customer service	10	4
F/601/1237	Unit 24: Make customer service environmentally friendly and sustainable	11	4

Unit reference	Option Group B (Delivery)	Credit	Level
H/601/1229	Unit 33: Deliver customer service using service partnerships	6	3
Y/601/1230	Unit 34: Organise the delivery of reliable customer service	6	3
H/601/1232	Unit 35: Improve the customer relationship	7	3
M/601/1234	Unit 36: Maintain and develop a healthy and safe customer service environment	8	4
A/601/1236	Unit 37: Plan, organise and control customer service operations	10	4
J/601/1238	Unit 38: Review the quality of customer service	8	4
L/601/1239	Unit 39: Build and maintain effective customer relations	8	4
F/601/1240	Unit 40: Deliver seamless customer service with a team	8	4
Unit reference	Option Group C (Handling Problems)	Credit	Level
J/601/1515	Unit 45: Monitor and solve customer service problems	6	3
D/601/1519	Unit 46: Apply risk assessment to customer service	10	3
D/601/1522	Unit 47: Process customer service complaints	6	3
K/601/1524	Unit 48: Handle referred customer complaints	10	4

Unit reference	Option Group D (Development and Improvement)	Credit	Level
D/601/1553	Unit 56: Work with others to improve customer service	8	3
H/601/1554	Unit 57: Promote continuous improvements	7	3
K/601/1555	Unit 58: Develop your own and others' customer service skills	8	3
H/601/1568	Unit 59: Lead a team to improve customer service	7	3
H/601/1571	Unit 60: Gather, analyse and interpret customer feedback	10	3
T/601/1574	Unit 61: Monitor the quality of customer service transactions	7	3
L/601/1578	Unit 62: Implement quality improvements to customer service	10	4
L/601/1581	Unit 63: Plan and organise the development of customer service staff	9	4
M/601/1587	Unit 64: Develop a customer service strategy for a part of an organisation	11	4
A/601/1592	Unit 65: Manage a customer service award programme	7	4
Y/601/1597	Unit 66: Apply technology or other resources to improve customer service	11	4
R/601/1601	Unit 67: Review and re-engineer customer service processes	11	4
K/601/1605	Unit 68: Manage customer service performance	7	4

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 strategy for the sector, or

- as part of a training programme.

Assessment strategy

The assessment strategy for these qualifications has been included in *Annexe D*. It has been developed by the Institute of Customer Service 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 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 Edexcel standards verifier. A range of recording documents is available on the Edexcel website www.edexcel.com. Alternatively, centres may develop their own.

What do you need to offer these qualifications?

Centre recognition

Centres that have not previously offered Edexcel 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 Edexcel 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. Edexcel 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 Edexcel's quality assurance processes is given in *Annexe B*.

What resources are required?

Each qualification is designed to support learners working in the customer service 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 D: 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:

> The unit title is accredited on the QCF and this form of words will appear on the learner's

Unit code:

> This is Edexcel's reference number for the specified unit.

Unit reference number:

> This NDAQ code is a unique reference number for the unit.

QCF level:

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

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:

> A notional measure of the substance of a qualification. It includes an estimate of the time that might be allocated to direct teaching or instruction, together with other structured learning time, such as directed assignments, assessments on the job or supported individual study and practice. It excludes learner-initiated private 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

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: Communicate using customer service language

Unit code:	F1
Unit reference number:	F/601/1609
QCF 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

1 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4 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 a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
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			
		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			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	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: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 2: Follow the rules to deliver customer service

Unit code:	F2
Unit reference number:	L/601/1614
QCF 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

1 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4 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.

5 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 a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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	1.1	follow organisational practices and procedures that relate to their customer service work			
		1.2	recognise the limits of what they are allowed to do when delivering customer service			
		1.3	refer to somebody in authority when they need to			
		1.4	work in a way that protects the security of customers and their property			
		1.5	work in a way that protects the security of information about customers			
2	know how to follow the rules to deliver customer service	2.1	describe organisational practices and procedures that relate to their customer service work			
		2.2	identify the limits of what they are allowed to do when delivering customer service			
		2.3	explain when and how they should refer to somebody in authority about the rules for delivering customer service			
		2.4	explain how they protect the security of customers and their property			
		2.5	explain how they protect the security of information about customers			
		2.6	describe their health and safety responsibilities as they relate to their customer service work			

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: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(*if sampled*)

Unit 3:   Demonstrate understanding of customer service

Unit code: F3

Unit reference number: K/601/1622

QCF level: 3

Credit value: 6

Guided learning hours: 40

Unit summary

This unit is about being able to understand and explain the principles of customer service and the way they can be applied in specific customer service situations. The basic principles in this unit influence all aspects of making customer service work and enable the learner to place professional customer practice in the context of their industry sector and their own organisation. Above all, working as a customer service professional involves working with colleagues to develop deeper and broader understanding of customer service language and principles.

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 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 with different customers on different occasions for their assessor to be confident that they are competent.

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

5   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.

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.

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Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	follow their organisation's accepted customer service language	1.1	communicate to customers their organisation's service offer, how it balances organisational and customer needs and how it meets customer expectations			
		1.2	compare the service offers of commercial, public sector and third sector organisations and how they each meet customer expectations			
		1.3	discuss with colleagues steps that team members can take to deal with different customers and different customer service situations			
2	apply customer service principles in their customer service role	2.1	follow the key policies and procedures in their organisation for the delivery of services or products			
		2.2	demonstrate how their organisation's service approach and service offer fit within their own industry and differ from those of other industries			
		2.3	discuss with colleagues how their organisation's ethical and value base fits with organisational needs and customer expectations			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	understand the principles of customer service	3.1	describe how their organisation's service offer meets customer expectations			
		3.2	explain how their organisation's service offer is affected by financial and other resource limitations			
		3.3	identify the impact that their organisation's service offer may have on different people in the service chain			
		3.4	explain how customers form their expectations of the services or products			
		3.5	explain the importance of effective teamwork for the delivery of excellent customer service			
		3.6	describe how customer service can contribute to best value in a public sector or third sector organisation			
		3.7	explain how customer service can provide a competitive advantage for a commercial organisation			
		3.8	describe why their organisation must limit the customer service it gives to balance customer satisfaction with organisational goals			
		3.9	explain how to deal with different customer behaviours and personalities to achieve customer satisfaction			
		3.10	explain the importance of effective communication in the delivery of excellent customer service			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.11 describe how they ensure their communication with diverse groups of customers is effective and efficient			
	3.12 describe the importance of continuous improvement within customer service			
	3.13 explain the key policies and procedures in their organisation for the delivery of services or products and why it is important to follow them			
	3.14 explain how their industry's approach to customer service differs from the approach of another industry			
	3.15 outline the service offer of competitors of their organisation or any organisations offering similar services or products			
	3.16 describe the features and benefits of their organisation's services or products that influence customer service delivery and customer satisfaction			
	3.17 explain how their organisation balances its needs with customer expectations and needs			
	3.18 justify the ethical and value base of their organisation's approach to customer service			
	3.19 explain how their behaviour when improving customer service delivery affects the success of any changes to customer expectations and needs			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 4: Demonstrate understanding of the rules that impact on improvements in customer service

Unit code:	F4
Unit reference number:	J/601/1627
QCF level:	3
Credit value:	6
Guided learning hours:	40

Unit summary

This unit is about the rules, regulations and legislation that can impact on the way the learner develops and improves customer service. It requires the learner to demonstrate that they follow those rules when taking actions to improve customer service

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 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 with different customers on different occasions for their assessor to be confident that they are competent.

4   The 'organisation' from which the learner draws their evidence must be the organisation they work for. 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. 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	demonstrate an understanding of the organisational rules and procedures that impact on customer service improvements	1.1	identify organisational policies, procedures and practices that may impact on proposed improvements in customer service			
		1.2	identify procedures and actions needed to gain approval for proposed improvements in customer service			
		1.3	agree with colleagues or service partners the actions needed to meet organisational requirements when implementing proposed customer service improvements			
2	demonstrate an understanding of the legislation and external regulation that impact on customer service improvements	2.1	identify relevant customer related legislation and external regulation that may affect the implementation of customer service improvements			
		2.2	identify relevant general business legislation and external regulation that may affect the implementation of customer service improvements			
		2.3	balance the requirements of legislation and external regulation with the needs of the organisation when implementing customer service improvements			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	understand the rules that impact on improvements in customer service	3.1	describe organisational policies, procedures and practices that they need to take into account when they propose improvements in customer service			
		3.2	explain how to gain approval to change customer service procedures or practices			
		3.3	state the limits of their own authority and who else in the organisation needs to be involved if they cannot authorise improvements alone			
		3.4	explain how they would involve colleagues or service partners in the implementation of improvements			
		3.5	explain relevant legislation and external regulation relating to consumer protection			
		3.6	explain relevant legislation and external regulation relating to data protection			
		3.7	explain relevant legislation and external regulation relating to disability discrimination and equal opportunities			
		3.8	explain relevant legislation and external regulation relating to diversity, inclusion and discrimination for reasons other than disability or equal opportunities			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.9 explain relevant legislation and external regulation relating to health and safety of customers and colleagues			
	3.10 compare the need to balance the requirements of legislation and external regulation with the needs and objectives of their organisation			
	3.11 explain legislation and external regulation that affect customer service in their industry in particular			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(*if sampled*)

Unit 5: Demonstrate understanding of customer service management

Unit code: F5

Unit reference number: J/601/1630

QCF level: 4

Credit value: 10

Guided learning hours: 65

Unit summary

This unit covers the key principles of customer service that influence how it is managed and the links between management responsibilities and those key principles. The unit also recognises that knowledge and understanding of customer service principles and systems required in a management role may not be as detailed as that required in a delivery role. Instead, knowledge and understanding must relate clearly to a more strategic appreciation of the principles of customer service. This unit provides the opportunity to demonstrate the knowledge and understanding that is needed to be effective in customer service management.

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 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 'organisation' from which the learner draws their evidence must be the organisation they work for. 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. 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	demonstrate an understanding of the principles of customer service that influence the way it is managed	1.1	exercise customer service management responsibility with consideration for their organisation's service offer, customer expectations and resources			
		1.2	supervise and develop staff skills in the delivery of customer service			
		1.3	contribute to the development of customer service policies, culture and ethics in their organisation			
		1.4	evaluate options for technology that will improve customer service delivery			
		1.5	carry out risk assessment when dealing with customer service problems			
2	demonstrate how their management responsibilities link with customer service principles	2.1	display leadership in a customer service role			
		2.2	contribute to recruitment and development of staff with appropriate customer service skills			
		2.3	monitor and maintain effective customer service in their organisation			
		2.4	promote improvement of customer service in their organisation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	understand how their management responsibilities link with customer service principles	3.1	describe the customer service management role and responsibilities in relation to their organisation's service offer			
		3.2	describe the customer service management role and responsibilities in relation to customer expectations and customer satisfaction			
		3.3	explain how effective customer service depends on a combination of organisational systems and the skills of those responsible for customer service delivery			
		3.4	explain how organisational systems balance customer satisfaction, financial considerations and the requirements of legislation and regulation			
		3.5	explain how effective customer service delivery by staff involves a combination of skills acquired through training and experience and personality			
		3.6	compare the options for monitoring customer service performance and the benefits and drawbacks of each option			
		3.7	explain the use of customer service as a competitive tool by the commercial sector and its use as a contribution to best value in the public or third sectors			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	3.8	describe the key features of a customer service culture in an organisation			
	3.9	explain how risk assessment can be applied to customer service situations when dealing with customer service problems			
	3.10	evaluate options for making use of technology to improve customer service delivery			
	3.11	describe ways in which an organisation can seek continuous improvement in its customer service			
	3.12	describe ways in which the ethical and values bases of an organisation's approach to customer service are demonstrated and maintained			
	3.13	explain the nature of their responsibilities for customer service resources and systems in their organisation			
	3.14	describe their leadership role in customer service delivery			
	3.15	identify the key skills and attributes to be sought when recruiting for a person to deliver customer service in their organisation			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.16 describe options for training and development of their organisation's staff in customer service and the benefits and drawbacks of each option			
	3.17 identify qualifications in customer service that may be appropriate for the development of people in their organisation			
	3.18 explain the importance of the steps they take to monitor and maintain effective delivery of customer service in their organisation			
	3.19 describe ways in which they promote continuous improvement within their organisation			
	3.20 explain the importance of establishing a strong network of contacts with similar interests in customer service			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(*if sampled*) Date: _____

Unit 6: Follow organisational rules, legislation and external regulations when managing customer service

Unit code:	F6
Unit reference number:	D/601/1634
QCF level:	4
Credit value:	10
Guided learning hours:	65

Unit summary

This unit is about management responsibilities in a role that is directly related to customer service generally involving actions and a set of knowledge and understanding of legislation and regulation that impact on the management function and the way it is fulfilled. It is about observing the law and rules and what the individual needs to know and understand in order to manage customer service processes effectively.

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 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 'organisation' from which the learner draws their evidence must be the organisation they work for. 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. 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 rules and culture related to customer service	1.1	contribute to the development of customer service in their organisation within the organisation's rules and culture			
		1.2	act within their own authority to promote customer service in their organisation			
		1.3	use appropriate sources of information about organisational rules, policies and procedures that relate to customer service			
		1.4	deal with customer service problems and complaints within organisational rules			
2	follow legislation and external regulation when managing customer service	2.1	manage customer service activities following legislation and external regulation			
		2.2	assess the risks resulting from non-compliance with legislation and external regulation when supervising the delivery of customer service			
		2.3	contribute to development of customer service policies and strategy that comply with legislation and external regulation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	understand the rules to follow when managing customer service	3.1	explain the steps that managers can take to encourage development of a customer service culture in their organisation			
		3.2	describe the importance of influencing skills for the development of customer service in their organisation			
		3.3	identify the opportunities provided and constraints placed on customer service delivery by the policies and procedures of their organisation			
		3.4	describe the structure of authority in their organisation relating to customer service management			
		3.5	explain the limits of their own authority and who else in the organisation needs to be involved if they cannot authorise customer service management actions alone			
		3.6	explain how they should involve service partners in customer service management actions			
		3.7	identify the sources of information about organisational rules, policies and procedures that relate to customer service			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	3.8	explain their organisation's definition of a complaint and their responsibility in connection with complaints			
	3.9	explain the structure of legislation and external regulation that impacts on the customer service of their organisation			
	3.10	explain the importance of the regulatory authority of different legal and regulatory bodies for their organisation			
	3.11	explain the risks for their organisation presented by non-compliance with different legal and regulatory bodies			
	3.12	describe the level of knowledge and understanding needed by people in their organisation involved in customer service delivery regarding relevant legislation and external regulation			
	3.13	explain the importance of taking full account of legal and regulatory requirements when planning customer service developments			
	3.14	describe the relationship between customer service strategy and compliance			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(if sampled)

Unit 7: Maintain a positive and customer-friendly attitude

Unit code: A1

Unit reference number: R/601/1209

QCF 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

1 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4 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.

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

    a   easy to deal with

    b   difficult to deal with.

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

    a   during routine delivery of customer service

    b   during a busy time in their job

    c   during a quiet time in their job.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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			
		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 8: Adapt your behaviour to give a good customer service impression

Unit code: A2

Unit reference number: L/601/1211

QCF level: 1

Credit value: 5

Guided learning hours: 33

Unit summary

This unit is all about how the learner's behaviour affects the way customers see them. Some customers expect different things from the service they offer but there are basic acceptable standards of behaviour and attitudes that they need to achieve. Their managers and supervisors also expect them to meet those standards. When they create the right impression and show a positive attitude they reduce the risk of somebody being upset or offended by the way they deal with them. This unit is appropriate for learners who have done jobs where they had limited contact with customers, are experiencing customer service work for the first time or are just starting their first job. If a learner has already successfully done full or part-time work dealing directly with customers, this may not be the right unit for them and they should consider the unit – 'Maintain a positive and customer-friendly attitude'.

Assessment requirements/evidence requirements

1 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4 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.

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

   a easy to deal with

   b difficult to deal with.

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

   a during routine delivery of customer service

   b during a busy time in their job

   c during a quiet time in their job.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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	look and act the part in order to provide a good customer service impression	1.1	dress for customer service work in the way their organisation expects			
		1.2	show they are working hard and making efforts to impress customers			
		1.3	be in the right place at the right time to give a good impression and deliver good customer service			
		1.4	show good manners when dealing with customers			
2	relate to their customers and to colleagues effectively	2.1	explain the benefits of dealing with customers face to face or by telephone rather than using text, email or writing			
		2.2	talk clearly to customers using words that they can understand			
		2.3	talk to customers without using language that they would consider to be bad			
		2.4	show a willing and friendly attitude when dealing with customers without being over-familiar			
		2.5	help and cooperate with colleagues to give good service to customers			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	know how to adapt their behaviour to give a good customer service impression	3.1	identify how the way they dress affects the way that customers react to the service they provide			
		3.2	describe why customers may see particular types of dress as inappropriate and how their organisation expects them to dress			
		3.3	state why it is important for customers to feel that they are working hard to give them an excellent service			
		3.4	state why good timekeeping and making sure they are where they are expected to be is important to giving excellent customer service			
		3.5	describe what behaviour is considered by most customers to be 'good manners' and what is considered to be 'bad manners' or rudeness			
		3.6	identify what customers and colleagues might consider to be bad language and why it may offend people			
		3.7	identify why customers feel better about the service they receive if they have a willing and friendly attitude			
		3.8	describe how to behave so that they appear to be willing and friendly with customers without being over-familiar			
		3.9	identify what they can do to cooperate with colleagues in giving customer service and why that might be helpful			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(*if sampled*)

Unit 9: Communicate effectively with customers

Unit code:	A3
Unit reference number:	R/601/1212
QCF level:	2
Credit value:	5
Guided learning hours:	33

Unit summary

To provide good customer service the learner needs to understand what customers want and how they feel. This means that they need to share information with them and listen carefully to them. Customers need to understand what the learner is telling them and what they are able to do for them. Communication is an essential skill for delivering good customer service.

Assessment requirements/evidence requirements

1 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4 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.

5   The learner needs to include evidence that they have communicated effectively with customers:

   a   during routine delivery of customer service

   b   during a busy time in their job

   c   during a quiet time in their job.

6   The learner needs to include evidence that they have communicated effectively with different customers who:

   a   have an easy-going attitude

   b   have a difficult attitude

   c   are easy to understand

   d   are difficult to understand.

7   The messages the learner passes on to colleagues may be verbal, in writing or passed on by any other method they would be expected to use within their job.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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 communicate effectively with customers	1.1 listen actively to what customers are saying			
	1.2 identify the most important things that customers are telling them			
	1.3 respond appropriately to what customers are telling them			
	1.4 check that they understand what customers are telling them and make sure it is really what they mean			
	1.5 summarise information for customers			
	1.6 explain in a way that is clear and does not cause offence when they cannot help a customer			
	1.7 use appropriate body language when communicating with customers			
	1.8 read customers' body language to help them understand their feelings and wishes			
	1.9 deal with customers in a respectful, helpful and professional way at all times			
	1.10 help to give good customer service by passing messages to colleagues			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	understand how to communicate effectively with customers	2.1 identify the difference between hearing and listening			
		2.2 explain how to listen actively			
		2.3 describe how to read both positive and negative body language			
		2.4 explain how to use body language effectively			
		2.5 state how to use questions to check that they understand what customers are telling them			
		2.6 identify the difference between negative and positive language			
		2.7 explain how to summarise			
		2.8 explain why it is important to speak clearly			
		2.9 explain why it is important to use words that the customer will understand			
		2.10 describe how to communicate with customers who have language, dialect or accents that are different from theirs			
		2.11 explain why the way things are said, and the tone of voice, affects the way a customer experiences customer service			
		2.12 identify what information is helpful to pass on in messages to colleagues so that customers receive good service			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(*if sampled*)

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Unit 10: Give customers a positive impression of yourself and your organisation

Unit code: A4

Unit reference number: L/601/0933

QCF 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

1 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4 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.

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

   a   during routine delivery of customer service

   b   during a busy time in their job

   c   during a quiet time in their job

   d   when people, systems or resources have let them down.

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

   a   using appropriate spoken or written language

   b   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 a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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 11: Promote additional services or products to customers

Unit code: A5

Unit reference number: D/601/0936

QCF 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 learner's 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 services or products to customers.

Assessment requirements/evidence requirements

1 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4   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.

5   The learner must provide evidence that the additional services or products offered include:

    a   use of services or products that are new to their customer

    b   additional use of services or products that their customer has used before.

6   The learner's evidence must show that they:

    a   identify what their customer wants by seeking information directly

    b   identify what their customer wants from spontaneous customer comments.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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	1.1	update and develop their knowledge of their organisation's services or products			
		1.2	check with others when they are unsure about new service or product details			
		1.3	identify appropriate services or products that may interest their customer			
		1.4	spot opportunities for offering their customer additional services or products that will improve the customer experience			
2	inform customers about additional services or products	2.1	choose the best time to inform their customer about additional services or products			
		2.2	choose the best method of communication to introduce their customer to additional services or products			
		2.3	give their customer accurate and sufficient information to enable them to make a decision about the additional services or products			
		2.4	give their customer time to ask questions about the additional services or products			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
3 gain customer commitment to using additional services or products	3.1	close the conversation if the customer shows no interest			
	3.2	give information to move the situation forward when their customer shows interest			
	3.3	secure customer agreement and check customer understanding of the delivery of the service or product			
	3.4	take action to ensure prompt delivery of the additional services or products to their customer			
	3.5	refer their customer to others or to alternative sources of information if the additional services or products are not their responsibility			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	understand how to promote additional services or products to customers	4.1	describe the organisation's procedures and systems for encouraging the use of additional services or products			
		4.2	explain how additional services or products will benefit their customers			
		4.3	explain how their customer's use of additional services or products will benefit their organisation			
		4.4	identify the main factors that influence customers to use their services or products			
		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			
		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 12: Process information about customers

Unit code: A6

Unit reference number: H/601/1215

QCF 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

1 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4 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.

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

   a   new customers

   b   existing customers.

6   The learner's evidence must show that they have:

   a   checked whether the information they are collecting and retrieving is accurate and up-to-date

   b   selected information that is directly relevant to each of their customers.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*) Date: _____

Unit 13: Live up to the customer service promise

Unit code:	A7
Unit reference number:	M/601/1217
QCF level:	2
Credit value:	6
Guided learning hours:	40

Unit summary

The learner may work in an organisation that has a carefully defined brand and vision that includes a specific service offer and promise to their customers. Often, much work has taken place to develop these, and they influence what the customer expects. By promoting the brand, the organisation is making a promise to their customers about what they can expect. Customer satisfaction is unlikely to be achieved if their customer's experience does not match their expectations of that promise. Even in organisations without a strong brand image, customers often have firm expectations. This unit is about the way the learner's work supports the branding of their services or products. It covers what they must do to make sure that they deliver the promise that the customer has come to expect. It also covers how the learner can avoid giving their customer an experience that is significantly different from the one offered in the promise.

Assessment requirements/evidence requirements

1   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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4   The learner's organisation's service offer, vision and promise may be expressed formally or may be simply an informal description of the way customer service is delivered.

5   The learner's evidence of their organisation's service offer, vision and promise must include examples of:

    a   the way these are communicated to customers

    b   how their job role links with their organisation's offers.

6   The learner must show how they deliver the customer service promise:

    a   through their own efforts

    b   by working with others.

7   The learner's evidence must show that they have taken opportunities to reinforce their organisation's message:

    a   through organisation initiatives

    b   by responding to opportunities when dealing with customers.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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 and explain the customer service promise	1.1	explain the key features of the service offer, vision and promise their organisation has made			
		1.2	identify the role they can play to ensure that their customer believes that the service offer, vision and promise is being delivered			
		1.3	explain the procedures and regulations their organisation follows to support the service offer, vision and promise			
		1.4	devise and use phrases that reinforce the service offer, vision and promise			
		1.5	identify and avoid phrases that might be used, but would not fit with the service offer, vision and promise			
		1.6	identify moments and actions within the delivery of customer service that are particularly relevant to their customer's experience of the promise being delivered			
		1.7	share ideas with colleagues about how particular words and approaches help to support the service offer, vision and promise			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
2 produce customer satisfaction by delivering the customer service promise	2.1	ensure that their appearance and behaviour supports the organisation's service offer, vision and promise			
	2.2	observe or listen to the customer closely to identify opportunities to reinforce their understanding of the service offer, vision and promise			
	2.3	take actions to deliver customer service in a way that meets their customer's expectations and understanding of the service offer, vision and promise			
	2.4	ensure that what they decide to do is realistic and in line with the service offer and promise			
	2.5	be positive about and supportive of the service offer and promise			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	know how to live up to the customer service promise	3.1	identify the key features, moments of truth (those points in the customer service process that have the most impact on the customer experience) and customer experiences that define the organisation's service offer, vision and promise			
		3.2	Identify ways in which staff can contribute to communicating the service vision or promise to customers			
		3.3	explain sales, marketing and/or public relations reasons for defining a service offer, vision and promise			
		3.4	describe how words can be used and adapted to reflect a defined service offer, vision and promise			
		3.5	describe how actions can be used and adapted to reflect a defined service offer, vision and promise			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(*if sampled*) Date: _____

Unit 14: Make customer service personal

Unit code: A8

Unit reference number: T/601/1218

QCF level: 2

Credit value: 6

Guided learning hours: 40

Unit summary

Research has shown that customer satisfaction increases if customers feel that they have been treated in a way that recognises their own personal needs. When they are delivering customer service learners often deal with a large number of customers who seem to be the same, but it is important to remember that each customer is an individual. Anything the learner can do to make each customer feel that they have had their complete attention and have been dealt with personally increases their sense of satisfaction. This unit is about how the learner can help their customers feel that they have experienced service that focuses on them as an individual. When the learner works with a customer they need to give the impression that it is on a 'one to one' basis, that they care what happens to their customer and that they respect their customer as an individual.

Assessment requirements/evidence requirements

1   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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4   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.

5   The learner must provide evidence of making customer service personal:

   a   during routine delivery of customer service

   b   during a busy time in their job

   c   during a quiet time in their job

   d   when people, systems or resources have let them down.

6   The learner's evidence must include examples of how they have dealt with customers who are:

   a   happy with the service they are receiving

   b   unhappy about the service they are receiving.

7   The learner must provide evidence that they have made customer service more personal:

   a   when they have taken the initiative

   b   in response to an opportunity presented when their customer has asked a question.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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 opportunities for making customer service personal	1.1	identify which of their organisation's systems or procedures allows them to add a personal touch to the service			
		1.2	observe and listen to their customer carefully for signs that will guide how they personalise the service			
		1.3	let the customer know that they understand and that they are there to help			
		1.4	identify opportunities to help or direct their customer outside of normal routines and procedures			
		1.5	identify customers with particular needs who would especially appreciate personal service			
		1.6	balance the time they take when giving individual attention to one customer with the needs and expectations of other customers			
		1.7	make extra efforts to show how willing and able they are to give a more personal service			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	treat their customer as an individual	2.1	greet and deal with their customer in a way that respects them as an individual			
		2.2	focus their attention on the customer they are dealing with			
		2.3	always communicate with their customer in a friendly and open way			
		2.4	use their customer's name when it is known and appropriate			
		2.5	follow their organisation's guidelines about giving their customer their own name and contact details			
		2.6	concentrate on building a 'one to one' relationship with their customer by making them feel valued and respected			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	know and understand how to make customer service personal	3.1	explain how the use of the customer's name makes service more personal			
		3.2	describe personality types and their receptiveness to personalised services			
		3.3	identify types of personal information about customers that should and should not be kept on record			
		3.4	identify features of personal service that are most appreciated by customers with individual needs			
		3.5	describe body language and approaches that promote open communication			
		3.6	describe the organisation's guidelines on actions that are permissible outside of the normal routines and procedures			
		3.7	explain their own preferences and comfort levels relating to how they are willing and able to personalise service			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 15: Go the extra mile in customer service

Unit code: A9

Unit reference number: M/601/1220

QCF level: 2

Credit value: 6

Guided learning hours: 40

Unit summary

When the learner's customer feels that they have taken special care to give them good service and have done something more than they expect, they are likely to enjoy a better customer service experience. Opportunities to add this extra value to the customer's experience depend on the learner spotting what they will particularly appreciate. Often they can offer this little extra when sorting out a difficulty or problem. Whatever special service the learner gives when they 'go the extra mile' must be within their own authority or with the authority of an appropriate colleague. It must also take account of the organisation's service offer and all the relevant procedures and regulations. As customers, we all enjoy and remember it when somebody has 'gone the extra mile' to deliver special customer service.

Assessment requirements/evidence requirements

1   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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4   The learner must provide evidence of making customer service personal:

   a   during routine delivery of customer service

   b   during a busy time in their job

   c   during a quiet time in their job

   d   when people, systems or resources have let them down.

5   The learner's evidence must show that they have:

   a   followed organisational procedures to go the extra mile for customers

   b   used their own initiative when going the extra mile for customers.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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	distinguish between routine service standards and going the extra mile	1.1	explain the service offer clearly and concisely			
		1.2	identify their customer's expectations and needs			
		1.3	match the service offer with their customer's expectations and needs and identify the key differences			
		1.4	identify options for other actions that will give added value to customer service and might impress their customer			
		1.5	choose actions that are most appropriate to impress their customer			
2	check that your extra mile ideas are feasible	2.1	match their ideas for added value customer service against their authority to see them through			
		2.2	check that their ideas for added value customer service are possible within their organisation's guidelines			
		2.3	check that their ideas for added value customer service are possible within regulatory boundaries			
		2.4	check that their ideas for added value customer service will not unreasonably affect the service to their other customers			
		2.5	explain their ideas for added value service to a senior colleague or other appropriate authority			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
3 go the extra mile	3.1	take action to go the extra mile in customer service			
	3.2	ensure that their customer is aware of the added value of their actions			
	3.3	monitor the effects of their added value actions to ensure that the service given to their other customers is not affected unreasonably			
	3.4	note and pass on positive feedback from their customer about their actions			
	3.5	suggest that an extra mile action becomes routine if they have seen it work several times and it could be accommodated within the service offer			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
4 know how to go the extra mile in customer service	4.1	describe their organisation's service offer			
	4.2	explain how customers form expectations of the service they will receive			
	4.3	identify what types of service action most customers will see as adding value to the customer service they have already had			
	4.4	outline their organisation's rules and procedures that determine their authority to go the extra mile			
	4.5	Identify relevant legislation and regulation that impact on their freedom to go the extra mile			
	4.6	describe how their organisation receives customer service feedback on the types of customer experience that has impressed them			
	4.7	describe their organisation's procedures for making changes in its service offer			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 16:   Deal with customers face to face

Unit code:	A10
Unit reference number:	T/601/1221
QCF level:	2
Credit value:	5
Guided learning hours:	33

Unit summary

This unit is about the skills the learner needs to deal with their customer in person and face to face. When they are working with a customer in this way, good feelings about the way the learner looks and behaves can improve how their customer feels about the transaction and give them greater satisfaction. Whilst verbal communication is important, the learner focus on their customer and the relationship that is formed also depends on the non-verbal communication that takes place between them. The learner will have many opportunities to impress their customer and their behaviour in this situation can make all the difference to customer behaviour and the satisfaction that they feel.

Assessment requirements/evidence requirements

1 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

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

a have standard expectations of the learner's organisation's customer service

b have experienced difficulties when dealing with the learner's organisation

c have made a specific request for information

d need to be informed of circumstances of which they are unaware.

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

a planned

b unplanned.

6 The learner must provide evidence of dealing with customers face to face:

a during routine delivery of customer service

b during a busy time in their job

c during a quiet time in their job

d when people, systems or resources have let them down.

7 The learner must include examples of how they have made use of:

a verbal communication skills

b non-verbal communication skills.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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 communicate effectively with their customer	1.1	plan a conversation with their customer that has structure and clear direction			
	1.2	hold a conversation with their customer that establishes rapport			
	1.3	focus on their customer and listen carefully to ensure that they collect all possible information they need from the conversation			
	1.4	explain their services or products and their organisation's service offer to their customer clearly and concisely			
	1.5	adapt their communication to meet the individual needs of their customer			
	1.6	anticipate their customer's requests and needs for information			
	1.7	balance conflicting demands for their attention whilst maintaining rapport with their current customer			
	1.8	calm down situations when one customer is adversely affecting the customer service enjoyed by other customers			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	improve the rapport with their customer through body language	2.1	present a professional and respectful image when dealing with their customer			
		2.2	show an awareness of their customer's needs for personal space			
		2.3	focus their attention on their customer so that non-verbal signs do not betray disinterest, boredom or irritation			
		2.4	ensure that their customer focus is not disrupted by colleagues			
		2.5	observe all customers and the total customer service situation whilst maintaining rapport with their current customer			
		2.6	observe their customer to read non-verbal clues about the customer's wishes and expectations			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	understand how to deal with customers face to face	3.1	explain the importance of speaking clearly and slowly when dealing with a customer face to face			
		3.2	state the importance of taking the time to listen carefully to what the customer is saying			
		3.3	identify the organisation's procedures that impact on the way they are able to deal with their customers face to face			
		3.4	describe the features and benefits of the organisation's services or products			
		3.5	explain the organisation's service offer and how it affects the way they deal with customers face to face			
		3.6	explain the principles of body language that enables them to interpret customer feelings without verbal communication			
		3.7	explain the difference between behaving assertively, aggressively and passively			
		3.8	explain why the expectations and behaviour of individual customers will demand different responses to create rapport and achieve customer satisfaction			
		3.9	describe the agreed and recognised signs in customer behaviour in their organisation that indicates that their customer expects a particular action by them			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 17: Deal with incoming telephone calls from customers

Unit code:	A11
Unit reference number:	F/601/1223
QCF 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

1 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4 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.

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

    a have standard expectations of the learner's organisation's customer service

    b have experienced difficulties when dealing with the learner's organisation

    c have made a specific request for information

    d need to be informed of circumstances of which they are unaware.

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

    a planned

    b unplanned.

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

    a during routine delivery of customer service

    b during a busy time in their job

    c during a quiet time in their job

    d when people, systems or resources have let them down.

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

    a verbally

    b in a form that maintains a permanent record.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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			
		3.3	give clear and concise information to customers in response to questions or requests			
		3.4	use questions and answers to control the length of the conversation			
		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			
		3.6	put their customer on hold and ensure they cannot be heard if they are discussing action with others or calling a colleague			
		3.7	summarise the outcome of the call and any actions that they or their customer will take as a result			
		3.8	check before the call is finished that their customer is content that all their questions or requests have been dealt with			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
		3.9	complete any follow up actions agreed during the call			
		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			
		3.11	ensure that promises to call back are kept			
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			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	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			
	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: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(if sampled) Date: _____

Unit 18: Make telephone calls to customers

Unit code:	A12
Unit reference number:	J/601/1224
QCF level:	2
Credit value:	6
Guided learning hours:	40

Unit summary

Many customer service jobs involve contacting customers by telephone. Making an effective telephone call involves some very specific actions and should not be seen as a casual activity. By making a call to a customer the learner will have the opportunity to prepare and is therefore more likely to be able to lead the conversation in the direction they want it to go. This unit is about planning and making calls to customers in a way that contributes positively to the organisation's customer service.

Assessment requirements/evidence requirements

1   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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4   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.

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

   a   are receptive to the content of their call

   b   are not receptive to the content of their call.

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

   a   during routine delivery of customer service

   b   during a busy time in their job

   c   during a quiet time in their job

   d   when people, systems or resources have let them down.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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 their calls effectively	1.1	use all appropriate customer information to plan their call			
		1.2	anticipate their customer's expectations and assemble all the information they might need before their conversation with the customer			
		1.3	identify the objective of their call and the way in which they expect the call to end			
		1.4	plan the opening part of their conversation with their customer and anticipate possible responses			
2	use communication systems effectively	2.1	operate telecommunication equipment efficiently and effectively			
		2.2	speak clearly and slowly and adapt their speech to meet the individual needs of their customer			
		2.3	listen carefully when collecting information from their customer			
		2.4	select the information they need to record and store following their organisation's guidelines			
		2.5	update their customer records during or after the call to reflect the key points of the conversation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	make focussed calls to their customer	3.1	open the conversation positively and establish a rapport with their customer			
		3.2	confirm the identity of their customer following organisational guidelines			
		3.3	ensure that their customer is aware of the purpose of their call as early as possible			
		3.4	respond positively to queries and objections from their customer			
		3.5	summarise the outcome of the call and any actions that they or their customer will take as a result			
		3.6	complete any follow up actions agreed during the call			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
4 know how to make telephone calls to customers	4.1	describe the relevant parts of legislation, external regulations and their organisation's procedures relating to the use of customer information to plan calls			
	4.2	describe their organisation's guidelines and procedures for the use of telecommunication technology			
	4.3	explain how to operate their organisation's telecommunication technology			
	4.4	explain the importance of speaking clearly and slowly when dealing with customers by telephone			
	4.5	describe the effects of smiling and other facial expressions that can be detected by somebody listening to them on the telephone			
	4.6	explain the importance of adapting their speech to meet the needs of customers who may find their language or accent difficult to understand			
	4.7	identify what information it is important to note during or after telephone conversations with customers			
	4.8	describe their organisation's guidelines and procedures for what should be said during telephone conversations with customers			
	4.9	describe their organisation's guidelines and procedures for taking action to follow up calls made to customers			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 19: Deal with customers in writing or electronically

Unit code: A13

Unit reference number: R/601/1226

QCF level: 3

Credit value: 6

Guided learning hours: 40

Unit summary

Some customer service delivery involves communicating with a customer in a way that creates a permanent record either in writing or electronically. This form of communication carries risks and implications that are less likely to apply to a conversation held with a customer face to face or on the telephone. This unit is all about how written or electronic communication can be made effective and can contribute to excellent customer service.

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 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 with different customers on different occasions for their assessor to be confident that they are competent.

4 The learner's communication with customers may be in writing, by text message, email, internet (including social networking), intranet or by any other method they would be expected to use within their job role providing that there is a permanent record of their communication with their customers.

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

   a have routine expectations of the learner's organisation's customer service

   b have experienced difficulties when dealing with the learner's organisation

   c have made a specific request for information

   d need to be informed of circumstances of which they are unaware.

6 The style and tone of the learner's communication must follow organisational guidelines and they must provide evidence that they have taken account of:

   a their job role and position in their organisation

   b the personal style and preferences of their customer

   c the conventions of the medium of communication they are using.

7 The learner must show that they have communicated with customers when:

   a they have initiated the contact

   b they are responding to a customer.

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 use written or electronic communication effectively	1.1	operate equipment used to communicate in writing or electronically efficiently and effectively			
	1.2	ensure that the period of time between exchanges in writing or electronically represents excellent customer service			
	1.3	use language that is clear and concise			
	1.4	adapt their use of language to meet the individual needs of their customer			
	1.5	ensure that the style and tone of their written or electronic communication follows their organisation's guidelines and matches the service offer			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
2 plan and send an effective written or electronic communication	2.1	anticipate their customer's expectations taking account of any previous exchanges they may have had			
	2.2	assemble all the information they need to construct the communication			
	2.3	plan the objective of their communication			
	2.4	format their communication following their organisation's guidelines			
	2.5	open the communication positively to establish a rapport with their customer			
	2.6	ensure that their customer is aware of the purpose of the communication as early as possible			
	2.7	summarise the key point of the communication and any actions that they or their customer will take as a result			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	handle incoming written or electronic communications effectively	3.1	read their customer's communication carefully to identify their precise reason for contacting them			
		3.2	identify what they are seeking as the outcome of the contact			
		3.3	identify all the options they have for responding to their customer and weigh up the benefits and drawbacks of each			
		3.4	choose the option that is most likely to lead to customer satisfaction within the service offer			
		3.5	summarise the outcome of the communication and any actions that they or their customer will take as a result			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
4 know how to deal with customers in writing or electronically	4.1	explain the importance of using clear and concise language			
	4.2	explain the additional significance and potential risks involved in committing a communication to a permanent record format			
	4.3	describe the effects of style and tone on the reader of a written or electronic communication			
	4.4	explain the importance of adapting their language to meet the needs of customers who may find the communication hard to understand			
	4.5	describe their organisation's guidelines and procedures relating to written and electronic communications			
	4.6	explain how to operate equipment used for producing and sending written or electronic communications			
	4.7	explain the importance of keeping their customer informed if there is likely to be any delay in responding to a communication			
	4.8	explain the risks associated with the confidentiality of written or electronic communications			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 20: Use customer service as a competitive tool

Unit code: A14

Unit reference number: D/601/1228

QCF level: 3

Credit value: 8

Guided learning hours: 53

Unit summary

Customer service contributes to an organisation's competitive position. Customers of many organisations have choice about the services or products they use and who supplies them. Often the technical features and cost of the service or product are almost identical. If this is the case, the quality of the customer service offered makes all the difference about which supplier the customer chooses. This unit is about how the learner can play their part in ensuring that their organisation makes the best possible use of the competitive advantage that can be gained from offering superior customer service. It covers how the learner can use customer service as a tool to compete effectively with other providers of similar services and products. The unit is not for a learner whose organisation does not compete actively with others.

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 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 with different customers on different occasions for their assessor to be confident that they are competent.

4   The learner must provide examples of when the benefits of using customer service as a competitive tool enjoyed by customers are:

    a   tangible in that they can be measured

    b   intangible in that they are represented solely by feelings and perceptions of the customer experience.

5   The learner's evidence must include examples of competitive analysis involving:

    a   direct competitors

    b   competitors offering substitute services or products.

6   The learner's evidence must include examples of when they have used customer service actions as a competitive tool to attract or maintain:

    a   loyal customers

    b   customers returning from competitors

    c   new customers.

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 organise customer service to gain a competitive advantage	1.1	develop their own and colleagues' understanding of the services and products offered by their organisation			
	1.2	define their organisation's service offer and the ways in which it compares with those of their competitors			
	1.3	set an example for colleagues and present an image to their customers that reinforces their organisation's service offer			
	1.4	encourage customer service actions that create and develop customer loyalty			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	deliver a competitive service	2.1	take positive actions and encourage colleagues to take actions that provide individual customers with added value within their organisation's service offer			
		2.2	remind customers about their service offer and the extra benefit it provides over those of their competitors			
		2.3	offer additional technical advice to customers within their organisation's service offer			
		2.4	show awareness of the financial implications of any added value actions that they or their colleagues might offer			
		2.5	meet customer service targets to ensure that customers see the benefit of dealing with them rather than with a competitor			
		2.6	re-direct customers to other service providers without offence when their expectations cannot be met by the organisation's service offer			
		2.7	ensure that customers who have shown a previous interest in repeat and additional services are reminded of this			
		2.8	encourage colleagues to offer complementary services and products when customer satisfaction indicates that customers would be interested in them			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	understand how to use customer service as a competitive tool	3.1	identify the factors that lead to customers' belief that they are enjoying value for money			
		3.2	describe the services and products offered by their organisation			
		3.3	describe the services and products offered by competitors			
		3.4	identify the features and benefits of services and products that are seen by customers as added value			
		3.5	explain the purpose of adding non-chargeable items to the service offer in order to impress customers and develop customer loyalty			
		3.6	explain how to portray a positive image that reinforces their organisation's competitive position			
		3.7	explain their organisation's customer service targets and cost implications of added value actions to improve the organisation's competitive position			
		3.8	describe complementary services and products that may be of interest to their customers			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 21: Organise the promotion of additional services or products to customers

Unit code: A15

Unit reference number: D/601/1231

QCF level: 3

Credit value: 7

Guided learning hours: 47

Unit summary

This unit is about expanding and extending the relationship with customers by persuading them to make use of additional services and products that the learner can offer. Services or products will remain viable only if they are used by customers. The unit covers the way the learner organises customer service to promote additional use of their services or products by communicating with customers and then delivering those services or products effectively. It is also about monitoring the successes and failures and recognising the best way to approach customers with additional services or products for the future. The learner needs to show that they are promoting the services or products by encouraging more people to use them.

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 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 with different customers on different occasions for their assessor to be confident that they are competent.

4   The learner must provide evidence that they:

a   use agreed organisational procedures and systems

b   create their own opportunities.

5   The learner's evidence must show that they have:

a   taken responsibility for their own actions in promoting services or products

b   used spontaneous customer feedback to identify opportunities for promoting services or products

c   used customer feedback that they have requested to identify opportunities for promoting services or products.

6   The learner's evidence must include examples of:

a   existing customers extending their use of the learner's organisation's services or products

b   new customers making use of the learner's organisation's services or products.

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	offer additional services or products	1.1	offer additional services or products to customers			
		1.2	identify the benefits of offering additional services or products for customers and the organisation			
		1.3	explain the features and benefits of additional services or products to customers			
		1.4	identify ways of encouraging customers to ask about additional services or products			
2	organise support to promote use of additional services or products	2.1	discuss with others ways of promoting additional services or products to customers			
		2.2	implement procedures to ensure that customers interested in additional services or products are dealt with promptly			
		2.3	promote services or products which will suit customers but which are supplied from outside their own area of the organisation			
		2.4	help customers to access services or products which are supplied outside of their own area of the organisation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	monitor the promotion of additional services or products	3.1	devise methods to inform customers about additional services or products			
		3.2	use different methods to inform customers about additional services and products and record successes and failures against each method			
		3.3	use their record of successes and failures to identify the best approach for offering additional services or products			
		3.4	share information with others regarding the best approach to take when offering additional services or products to customers			
4	understand how to organise and promote services or products to customers	4.1	describe their organisation's procedures and systems for encouraging the use of additional services or products			
		4.2	explain how the use of additional services or products will benefit their customers			
		4.3	describe the main factors that influence customers to use their services or products			
		4.4	explain how to introduce additional services or products to customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products			
		4.5	describe 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 22: Build a customer service knowledge set

Unit code: A16

Unit reference number: K/601/1233

QCF 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

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 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 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. 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: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(if sampled)

Unit 23: Champion customer service

Unit code: A17

Unit reference number: T/601/1235

QCF 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

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

  a strategic

  b operational.

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

    a   the quality of services or products

    b   the way services or products are delivered

    c   customer relationships.

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

    a   front line staff

    b   supervisors or team leaders

    c   senior managers

    d   colleagues in other departments

    e   service partners.

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

    a   the quality of services or products

    b   the way services or products are delivered

    c   customer relationships.

8   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. 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			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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			
		2.7	review the way they collect information, formulate advice and communicate it to others			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 24: Make customer service environmentally friendly and sustainable

Unit code:	A18
Unit reference number:	F/601/1237
QCF level:	4
Credit value:	11
Guided learning hours:	73

Unit summary

Environmental awareness and positive action form an important aspect of strategy for many organisations. Customer service may impact on environmental performance by demanding additional resources. Environmental policies may impact on customer service by placing restrictions on how it can be delivered. Periodically, the link between customer service and environmentalism needs to be reviewed so that appropriate changes may be made. Environmental and sustainability awareness must be encouraged constantly so that staff, suppliers, customers and other stakeholders are reminded of their contributions and responsibilities. This unit is appropriate for a learner whose job involves responsibility for customer service and sufficient authority to review and promote environmental matters in their organisation or in some part of it.

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 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 customer service systems referred to in the learner's evidence may be formal or informal.

5   The waste management policy used in the learner's evidence must cover:

   a   reduction

   b   re-use

   c   recycling

   d   disposal.

6   The learner's evidence should include working with customers who are:

   a   receptive to environmental initiatives

   b   resistant to environmental initiatives.

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 review and monitor environmental and sustainability aspects of customer service	1.1	identify their organisation's policies on customer service and on the environment and trace links between the two			
	1.2	identify their organisation's policy on energy management and carbon emissions and their key links with customer service systems			
	1.3	identify their organisation's policy on waste management and its key links with customer service systems			
	1.4	carry out a systematic review of their organisation's customer service systems to identify opportunities for environmental improvements			
	1.5	identify service partnerships that affect their organisation's environmental profile and what they might do to improve it			
	1.6	develop an action plan to promote environmental actions and improvements in their organisation's customer service delivery			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	promote environmental and sustainable aspects of customer service in their organisation	2.1	make links between their organisation's environmental policies and customer service delivery routines			
		2.2	encourage those involved in customer service delivery to promote an environmental approach by customers			
		2.3	identify and promote ways to minimise resource use in customer service delivery			
		2.4	communicate their organisation's environmental policies to service partners including suppliers and encourage their participation in environmental improvements			
		2.5	communicate their organisation's environmental policies to customers and encourage their participation in environmental improvements			
		2.6	develop staff awareness of environmental matters and ways they can contribute to environmentalism and sustainability			
		2.7	develop community stakeholders' awareness of their organisation's environmental policies and approaches			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 understand how to make customer service environmentally friendly and sustainable	3.1 explain principles of environmentalism and sustainability that are relevant to customer service operations			
	3.2 investigate ways to express environmental policies and link them with customer service			
	3.3 explain principles of energy management and reduction of carbon emissions			
	3.4 explain principles of waste management relevant to their organisation			
	3.5 evaluate techniques for reviewing environmental aspects of customer service systems			
	3.6 review different actions that may be taken to improve environmental aspects of customer service delivery			
	3.7 describe ways to minimise resource use in customer service delivery			
	3.8 evaluate techniques for communicating and developing awareness of environmental matters among stakeholders			
	3.9 describe ways to encourage customers to act more environmentally			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(if sampled)

Unit 25: Do your job in a customer friendly way

Unit code:	B1
Unit reference number:	A/601/1205
QCF level:	1
Credit value:	5
Guided learning hours:	33

Unit summary

The customer service that the learner's organisation gives is affected by the way they do their job. Whatever job the learner is doing, customers expect them to do it properly. They also expect the learner to consider their wishes and feelings while they are doing it. Doing their job properly involves following procedures and doing the tasks in their job correctly as well as having the appropriate relationship with customers. This unit covers how the learner does their job with their customer in mind in a way that the organisation and supervisors find acceptable. It will help the learner to understand the parts of their job that are most important to good customer service.

Assessment requirements/evidence requirements

1   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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4 The learner's evidence must show that they have done their job in a customer-friendly way:

   a during routine delivery of customer service

   b during a busy time in their job

   c during a quiet time in their job.

5 The learner needs to include evidence that they are doing their job in a customer-friendly way for customers who are:

   a easy to deal with

   b difficult to deal with.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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 do their job in a customer friendly way	1.1	make a good first impression			
	1.2	follow the dress code of their organisation and present the right personal image to their customers			
	1.3	do the tasks that make up their job in a way that shows they know what their customers expect and what their organisation offers			
	1.4	show consideration to customers when carrying out the tasks required in their job			
	1.5	respond willingly to routine requests and questions from customers and recognise when to pass a request on to an appropriate colleague			
	1.6	share information with customers about how delivery of the product or service is going			
	1.7	work flexibly to help individual customers without reducing the level of service they give to others			
	1.8	share information with colleagues when they need it to provide good customer service			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	know how to do their job in a customer-friendly way	2.1	describe their organisation's dress code			
		2.2	describe how to do the tasks that make up their job			
		2.3	identify how long parts of the job take to do and how this may affect their customers			
		2.4	describe how to do their own work in an organised way			
		2.5	identify what their customers expect of them and their work			
		2.6	identify the organisation's service offer and how this affects the way they do their work			
		2.7	state what they are allowed to do and not allowed to do for customers			
		2.8	state how to do their job in a way that is healthy and safe for them, their customers and their colleagues			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(*if sampled*) Date: _____

Unit 26:   Deliver reliable customer service

Unit code: B2

Unit reference number: J/601/1210

QCF level: 2

Credit value: 5

Guided learning hours: 33

Unit summary

This unit is about how the learner delivers consistent and reliable service to customers. As well as being good with people, the learner needs to work with their organisation's service systems to meet or exceed customer expectations. In the learner's job there will be many examples of how they combine their approach and behaviour with their organisation's systems. The learner will need to prepare for each transaction with a customer, deal with different types of customers in different circumstances and check that what they have done has met customer expectations. To meet this standard they have to deliver excellent customer service over and over again.

Assessment requirements/evidence requirements

1   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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4   The learner must provide evidence that they have worked with different customers who have different needs and expectations.

5   The learner must provide evidence of delivering reliable customer service:

   a   during routine delivery of customer service

   b   during a busy time in their job

   c   during a quiet time in their job

   d   when people, systems or resources have let them down.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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 deal with customers	1.1	keep their knowledge of their organisation's services or products up-to-date			
		1.2	ensure that the area they work in is tidy, safe and organised efficiently			
		1.3	prepare and arrange everything they need to deal with customers before their shift or period of work commences			
2	give consistent service to customers	2.1	make realistic customer service promises to customers			
		2.2	ensure that their promises balance the needs of their customers and their organisation			
		2.3	keep their promises to customers			
		2.4	inform their customers if they cannot keep their promises due to unforeseen circumstances			
		2.5	recognise when their customers' needs or expectations have changed and adapt their service to meet the new requirements			
		2.6	keep their customers informed if delivery of the service needs to involve passing them on to another person or organisation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	check customer service delivery	3.1	check that the service they have given meets their customers' needs and expectations			
		3.2	identify when they could have given better service to customers and how their service could have been improved			
		3.3	share information with colleagues and service partners to maintain and improve their standards of service delivery.			
4	know how to deliver reliable customer service	4.1	describe their organisation's services or products			
		4.2	explain their organisation's procedures and systems for delivering customer service			
		4.3	describe methods or systems for measuring an organisation's effectiveness in delivering customer service			
		4.4	explain their organisation's procedures and systems for checking service delivery			
		4.5	explain their organisation's requirements for health and safety in their area of work			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(*if sampled*) Date: _____

Unit 27:   Deliver customer service on your customer's premises

Unit code: B3

Unit reference number: Y/601/1213

QCF level: 2

Credit value: 5

Guided learning hours: 33

Unit summary

Many organisations deliver a service to their customers on the customer's own premises. This requires sensitive handling as people are particularly protective about their own personal space. In this situation there is always the potential to detract from excellent customer service by using inappropriate language or behaviour or even by causing accidental damage to the customer's property. This unit is about the process of providing a service on customer premises whilst ensuring that the customer both enjoys the customer service experience and has confidence that the work carried out has been completed successfully. This unit is not simply about working in a different building. The learner's customer must be somebody who feels real ownership of the premises and is therefore somewhat protective about them. In particular, this unit is for the learner whose job takes them into their customers' homes.

Assessment requirements/evidence requirements

1 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4   The learner must provide evidence that they deliver excellent customer service:

   a   during routine delivery of customer service

   b   during a busy time in their job

   c   during a quiet time in their job

   d   when people, systems or resources have let them down.

5   The learner must provide evidence that they deliver excellent customer service during:

   a   planned visits to their customer's premises

   b   visits to their customer's premises made at short notice.

6   The learner must provide evidence that they deliver excellent customer service:

   a   when their work goes to plan

   b   when their work does not go to plan.

7   The learner must provide evidence that they deliver excellent customer service:

   a   with their customer present

   b   when their customer is not present.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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 a rapport with their customer	1.1	prepare for a visit to customer premises and ensure the customer knows when and why they will be there			
		1.2	identify themselves to their customer showing official identification whenever possible			
		1.3	show a positive and friendly approach to the service they are about to give			
		1.4	use language and behaviour that show respect for their customer			
		1.5	explain to their customer exactly what they are going to do and approximately how long they expect the work to take			
		1.6	listen to any concerns that their customer may have and reassure them			
		1.7	keep their customer informed of progress and about any cause for delay that might take place			
		1.8	keep their customer informed of any variation to the work that could involve additional time or cost			
		1.9	consult their customer when they have to do work that the customer had not expected			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	combine customer service with their other skills and expertise	2.1	show respect to customer's premises and possessions by treating them with care			
		2.2	make sure their customer is aware of their specialist technical skills			
		2.3	take time to give their customer confidence in their knowledge and skills			
		2.4	consider the customer service implications of each action and inform their customer of what will be involved			
		2.5	inform their customer when they have finished and reinforce how the work has been handled professionally			
		2.6	check that their customer is satisfied with the work and listen carefully to any feedback			
		2.7	inform their customer of timescales if any follow up work is involved			
		2.8	ensure that timescales for follow up work are kept			
		2.9	keep their customer informed if timescales for follow up work are not going to be met			
		2.10	explain clearly to their customer why they cannot do work that is not specified in the service offer			
		2.11	ensure that their customer has the appropriate details to contact their organisation if the customer needs to			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
3 know how to deliver customer service on the customer's premises	3.1	describe what they can do to establish a rapport with the customers			
	3.2	explain the importance of sensitivity to people's feelings about their own premises and possessions			
	3.3	explain the regulatory and legal restrictions on what they can and cannot do in all aspects of their work			
	3.4	explain the insurance implications of working on their customer's premises			
	3.5	describe the organisational procedures they would take if they caused any accidental damage on their customer's premises			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled) Date: _____

Unit 28: Recognise diversity when delivering customer service

Unit code:	B4
Unit reference number:	K/601/1216
QCF level:	2
Credit value:	5
Guided learning hours:	33

Unit summary

Many customer service situations involve dealing with diverse groups of people inclusively and with respect. Responses to diversity can lead to discrimination that might or might not be deliberate. Discrimination can result from simply not knowing the beliefs and preferences of different groups or may result from actions based on stereotyping rather than on solid evidence obtained from the customer. This unit is about how the learner can establish their customer's expectations and needs in a way that takes full account of them as an individual. The unit also covers the way the learner provides customer service to diverse groups of customers, each of which has common likes and dislikes.

Assessment requirements/evidence requirements

1   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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4   The learner's evidence must show that they have developed their approach to diversity taking account of:

   a   relevant legislation

   b   sector or industry codes of practice

   c   the policies and procedures of their own organisation.

5   The learner must provide evidence that they have recognised diversity when delivering customer service to people from different groups in relation to four of these sources of diversity:

   a   age

   b   disability

   c   national origin

   d   sexual orientation

   e   values

   f   ethnic culture

   g   education

   h   lifestyle

   i   beliefs

   j   physical appearance

   k   social class

   l   economic status.

6   The learner must provide examples of situations when they have adapted their behaviour to:

   a   deliberately adopt different approaches to different groups of customers

   b   deliberately adopt a consistent approach to groups of customers who they recognise as having diverse requirements.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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	respect customers as individuals and promote equality in customer service	1.1	observe verbal and non-verbal clues that provide information about their customer's expectations and needs			
		1.2	identify and avoid features of stereotypes that might be applied to their customer that could carry the risk of causing offence			
		1.3	identify aspects of their customer's appearance or communication which risk leading them to treat the customer differently			
		1.4	consider aspects of their customer's appearance or communication in the light of their own beliefs about various groups of people that include their customer			
		1.5	question their customer to ensure that the impressions they are forming about their expectations and wishes are based on sound evidence			
		1.6	adjust their interpretation of the customer's expectations and wishes as a result of further evidence they have collected by talking to their customer			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	adapt customer service to recognise the different needs and expectations of diverse groups of customers	2.1	follow organisational procedures and guidelines that seek to make customer service inclusive for diverse groups of customers			
		2.2	show respect for their customer's individual beliefs, expectations and needs that may result from membership of a particular group			
		2.3	vary their approach to their customer to take account of beliefs, expectations and needs that result from membership of a particular group			
		2.4	work with colleagues to identify consistent approaches that team members should adopt when dealing with a particular group			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 understand how to recognise diversity when delivering customer service	3.1 explain the importance of recognising diversity in relation to age, disability, national origin, religion, sexual orientation, values, ethnic culture, education, lifestyle, beliefs, physical appearance, social class and economic status			
	3.2 explain reasons why consideration of diversity and inclusion issues affects customer service			
	3.3 describe organisational guidelines to make customer service inclusive for diverse groups of customers			
	3.4 explain how to observe and interpret non-verbal clues			
	3.5 describe how to listen actively for clues about their customer's expectations and needs			
	3.6 identify techniques for obtaining additional information from customers through tactful and respectful questions			
	3.7 describe behaviour that might cause offence to specific groups of people to whom they regularly provide customer service			
	3.8 explain how to impress specific groups of people to whom they regularly provide customer service			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 29: Deal with customers across a language divide

Unit code: B5

Unit reference number: A/601/1219

QCF level: 2

Credit value: 8

Guided learning hours: 53

Unit summary

Customer service is frequently delivered across a language divide. Customer service centres may be located in one country but deal mainly with another. In a multi-cultural society many customers may have a different first language from those delivering customer service to them. This language divide can present a real challenge to those who deliver customer service. This unit is about preparing to deliver customer service across a language divide and seeing through that delivery. The unit covers the steps that are needed to deal with customers with different language preferences without having full access to the learner's customer's first language. The learner should choose this unit if they frequently deal across a language divide. The learner should not choose this unit if they come across customers who do not share their first language only occasionally.

Assessment requirements/evidence requirements

1 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4   The learner must provide evidence of dealing with customers across a language divide:

   a   during routine delivery of customer service

   b   during a busy time in their job

   c   during a quiet time in their job.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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 deal with customers with a different first language	1.1	identify the language or languages other than their own that they are most likely to come across when dealing with customers			
		1.2	learn a greeting, an expression of thanks and a farewell phrase in the language they expect to encounter			
		1.3	identify a source of assistance with a language they expect to encounter when delivering customer service			
		1.4	agree with colleagues informal signing options that may be used for key aspects of their services or products when dealing with somebody with a different first language			
		1.5	log useful words and phrases to support their dealings with a customer with a different first language			
		1.6	learn an appropriate phrase to explain to a customer in their first language that they do not speak that language fluently			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	deal with customers who speak a different first language from their own	2.1	identify their customer's first language and indicate to the customer that they are aware of this			
		2.2	establish the expectations of the customer regarding whether they expect to deal in the learner's first language or theirs			
		2.3	speak clearly and slowly if using a language which is not the first language for either them or their customer			
		2.4	maintain a consistent tone and volume when dealing with somebody across a language divide			
		2.5	listen closely to their customer to identify any words they may be using in a way that differs from the way the learner would generally use the same words			
		2.6	check their understanding of specific words with their customer using questions for clarification			
		2.7	seek appropriate assistance from colleagues if they are unable to complete a customer transaction because of language barriers			
		2.8	reword a question or explanation if their customer clearly does not understand their original wording			
		2.9	use a few words of their customer's first language to create a rapport			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	know how to deal with customers across a language divide	3.1	list the languages that they are most likely to encounter among groups of their customers			
		3.2	state how to greet, thank and say farewell to customers in their first languages			
		3.3	explain the importance of dealing with customers in their first language if possible			
		3.4	describe how to explain to a customer that they cannot hold an extended conversation in their first language			
		3.5	explain the importance of tone, pace and volume when dealing with customers across a language divide			
		3.6	identify possible sources of assistance to use when a language barrier demands additional language skills			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*) Date: _____

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Unit 30: Use questioning techniques when delivering customer service

Unit code: B6

Unit reference number: A/601/1222

QCF level: 2

Credit value: 4

Guided learning hours: 27

Unit summary

This unit is about how the learner uses questioning both in planned sequences and in spontaneous conversation to paint a picture of what their customer wants and how the learner's organisation can deliver it. This unit is for a learner who comes into contact with their customer face to face, by voice technology or on-line with immediate interaction. This unit is probably not for a learner who deals with customers remotely when it takes time to exchange questions and responses.

Assessment requirements/evidence requirements

1   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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4   The learner must provide evidence of using questioning techniques when delivering customer service:

   a   during routine delivery of customer service

   b   during a busy time in their job

   c   during a quiet time in their job

   d   when people, systems or resources have let them down.

5   The learner needs to include evidence of using questioning techniques with customers who are:

   a   easy to deal with

   b   difficult to deal with.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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 and identify customer concerns	1.1 greet their customer sincerely and invite a full and open response			
	1.2 use planned or spontaneous lines to indicate to their customer that they empathise with their initial enquiry			
	1.3 invite more detailed explanation from their customer			
	1.4 listen closely to their customer's responses to strengthen their understanding of customer concerns			
	1.5 use both open and closed questions to make appropriate connection with their customer and open the door to more detailed investigation			
	1.6 identify and note their customer's feelings and mood in relation to the information they are seeking			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	seek detailed information from customers using questioning techniques	2.1	follow a planned trail of questions to explore in detail customer concerns they have already identified			
		2.2	hold a spontaneous conversation with their customer to explore in detail customer concerns they have already identified			
		2.3	explain to their customer why they need the information they are asking for			
		2.4	use probing and searching questions that draw on comments or words used by their customer			
		2.5	thank their customer for the information in a way that encourages further open responses			
		2.6	use pre-planned routing and trigger questions that lead their customer to respond in new areas			
		2.7	follow organisational procedures to record customer responses to inform future actions			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	understand how to use questioning techniques when delivering customer service	3.1	explain why establishing rapport makes it easier to draw information from customers			
		3.2	describe ways to greet customers that immediately build rapport			
		3.3	explain reasons for using planned question patterns to draw out particular information			
		3.4	explain reasons for using spontaneous conversation to draw out particular information			
		3.5	explain the importance of active listening when seeking detailed information from customers			
		3.6	identify the differences between and uses of closed and open questions			
		3.7	describe the importance of explaining to customers why information is needed			
		3.8	explain why particular trigger questions are effective in gaining specific information			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 31: Deal with customers using bespoke software

Unit code:	B7
Unit reference number:	L/601/1225
QCF 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 on-line. 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

1   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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4 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.

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

   a during routine delivery of customer service

   b during a busy time in their job

   c during a quiet time in their job

   d when people, systems or resources have let them down.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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 32: Maintain customer service through effective handover

Unit code:	B8
Unit reference number:	Y/601/1227
QCF 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

1 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

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

    a   during routine delivery of customer service

    b   during a busy time in their job

    c   during a quiet time in their job

    d   when people, systems or resources have let them down.

5   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 a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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 33: Deliver customer service using service partnerships

Unit code: B9

Unit reference number: H/601/1229

QCF level: 3

Credit value: 6

Guided learning hours: 40

Unit summary

Excellent customer service relies on teamwork. In many situations, successful delivery of service to end user customers relies on a complete service chain of internal or external customers and internal or external suppliers. For this to work, a series of service partnerships must be formed which will enable the chain to work efficiently and effectively. This unit is all about how to work effectively within a service chain and how to develop the links that cement key relationships. Effective communication and understanding of the roles of different organisations, departments and individuals are central to this area of the learner's work.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4　The service level agreement between service partners in the learner's evidence may be formal or informal.

5   The learner must provide examples of working in a service partnership on occasions when:

    a   the service partners are cooperative

    b   the service partners are un-cooperative.

6   The learner must include evidence to show that they have worked in a service partnership with:

    a   regular or long-term suppliers

    b   new suppliers.

7   The learner's evidence must show that they have negotiated agreements with service partners that are of benefit to:

    a   their organisation

    b   their service partner.

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 work effectively within a customer service chain	1.1	explain who is involved in the service chain that supplies their end user customers			
	1.2	identify which of those involved in their service chain is internal and which is external to their organisation			
	1.3	explain how the way they work with individual service partners contributes to an overall service chain			
	1.4	use the principles and practices applied to external customers to deliver excellent customer service to internal customers			
	1.5	work with internal customers and internal or external suppliers in the service chain to improve service to external customers			
	1.6	communicate effectively with internal customers to ensure that those customers are aware of any aspects of their work that might affect them			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	build and nurture positive relationships in a customer service chain	2.1	create a positive relationship between internal or external suppliers and customers by establishing rapport and showing understanding of everyone's roles in the service chain			
		2.2	identify where power and authority exist within the service chain			
		2.3	negotiate with internal customers and internal or external suppliers to establish service procedures that are acceptable to all and contribute to excellent customer service			
		2.4	develop positive relationships with an internal customer or supplier that are reflected in a formal or informal service level agreement that makes a positive contribution to the relationship			
		2.5	work with colleagues to develop and maintain awareness that a team within a service chain cannot work in isolation			
		2.6	agree with service partners how their work will be prioritised if there is a conflict of interest between the demands of internal and external customers			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	understand how to deliver customer service using service partnerships	3.1	describe the responsibilities and rights that can be built into an internal customer/supplier relationship			
		3.2	compare the benefits and drawbacks of describing a relationship in a service chain as a supplier/customer relationship or a service partnership			
		3.3	explain how to establish priorities if internal customer demands conflict with external customer demands			
		3.4	describe how to maintain team identity whilst working constructively with other teams to deliver excellent customer service			
		3.5	explain how to negotiate successfully with internal customers or suppliers			
		3.6	evaluate the formal and informal structures of the organisation and how they can influence relationships			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(if sampled) Date: _____

Unit 34: Organise the delivery of reliable customer service

Unit code: B10

Unit reference number: Y/601/1230

QCF 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

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 with different customers on different occasions for their assessor to be confident that they are competent.

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

    a   customers who are easy to deal with

    b   customers who are difficult to deal with

    c   existing customers

    d   new customers.

5   The learner's evidence must show that they have:

    a   taken responsibility for their own actions in the delivery of customer service

    b   used spontaneous customer feedback to improve customer service

    c   used customer feedback that they have requested to improve customer service.

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

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 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			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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			
		2.8	monitor the action they have taken to identify improvements in the service they give to their customers			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
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			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
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 35: Improve the customer relationship

Unit code: B11

Unit reference number: H/601/1232

QCF level: 3

Credit value: 7

Guided learning hours: 47

Unit summary

To improve relationships with their customers, learners need to deliver consistent and reliable customer service. In addition, customers need to feel that the learner genuinely wants to give them high levels of service and that the learner makes every possible effort to meet or exceed their expectations. This encourages loyalty from external customers or longer-term service partnerships with internal customers. The learner needs to be proactive in their dealings with their customers and to respond professionally in all situations. The learner needs to negotiate between their customers and their organisation or department in order to find some way of meeting their customers' expectations. In addition the learner needs to make extra efforts to delight their customers by exceeding customer service expectations.

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 performance evidence within this unit except when realistic practices are staged to test emergency procedures.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4   The learner's evidence must include examples of using:

   a   organisational procedures

   b   exceptions to standard practice that are legal and benefit their organisation.

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

   a   have different needs and expectations

   b   appear angry or confused

   c   behave unusually.

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	improve communication with their customers	1.1	select and use the best method of communication to meet their customers' expectations			
		1.2	take the initiative to contact their customers to update them when things are not going to plan or when they require further information			
		1.3	adapt their communication to respond to individual customers' feelings			
2	balance the needs of their customer and their organisation	2.1	meet their customers' expectations within their organisation's service offer			
		2.2	explain the reasons to their customers sensitively and positively when customer expectations cannot be met			
		2.3	identify alternative solutions for their customers either within or outside the organisation			
		2.4	identify the costs and benefits of these solutions to their organisation and to their customers			
		2.5	negotiate and agree solutions with their customers which satisfy them and are acceptable to their organisation			
		2.6	take action to satisfy their customers with the agreed solution when balancing customer needs with those of their organisation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	exceed customer expectations to develop the relationship	3.1	make extra efforts to improve their relationship with their customers			
		3.2	recognise opportunities to exceed their customers' expectations			
		3.3	take action to exceed their customers' expectations within the limits of their own authority			
		3.4	gain the help and support of others to exceed their customers' expectations			
4	understand how to improve the customer relationship	4.1	describe how to make best use of the method of communication chosen for dealing with their customers			
		4.2	explain how to negotiate effectively with their customers			
		4.3	explain how to assess the costs and benefits to their customers and their organisation of any unusual agreement they make			
		4.4	explain the importance of customer loyalty and/or improved internal customer relationships to their organisation			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(*if sampled*)

Unit 36: Maintain and develop a healthy and safe customer service environment

Unit code: B12

Unit reference number: M/601/1234

QCF level: 4

Credit value: 8

Guided learning hours: 53

Unit summary

Health and safety is important in all areas of work, and customer service is no exception. To provide high levels of customer service it is also important to provide an environment that enables and encourages staff to work effectively but safely for themselves and for customers. This unit is about managing the delivery of services or products in a way that is safe for customers and colleagues.

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 performance evidence within this unit except when realistic practices are staged to test emergency procedures.

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 show that they have assessed and
    controlled risks associated with:

    a   the use of equipment

    b   the working environment

    c   working practices

    d   potential breaches of security

    e   factors that affect the well-being of staff

    f   factors that affect the well-being of customers.

5   The learner must provide evidence that they have collected and
    evaluated key requirements of:

    a   legal requirements

    b   regulatory requirements

    c   organisational codes of practice

    d   ethical codes of practice.

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	assess the customer service environment for factors that affect health and safety	1.1	identify health and safety hazards in their customer service environment			
		1.2	assess the risks associated with these hazards			
		1.3	identify health and safety factors that may reduce the effectiveness of customer service staff or may cause concern to customers			
		1.4	evaluate health and safety factors that may reduce the effectiveness of customer service staff or may cause concern to customers against the organisation's policies and procedures and customer expectations			
		1.5	provide information about risks and hazards to those responsible for health and safety			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
2 minimise risks to health and safety in the customer service environment	2.1	ensure that staff have access to information on health and safety in the workplace and their responsibilities for health and safety			
	2.2	ensure that measures are in place to control risks to health and safety and are consistent with organisational policies and procedures			
	2.3	ensure that customers and staff are briefed on measures to control risks to health and safety and that they follow them			
	2.4	enable staff to identify and report health and safety hazards			
	2.5	use agreed organisational procedures to deal with hazards when they occur			
	2.6	review the health and safety aspects of the customer service environment as required by law and their organisation			
	2.7	carry out emergency drills within their area of responsibility			
	2.8	follow organisational procedures for keeping health and safety records up-to-date and for reporting health and safety incidents			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	understand how to maintain a healthy, safe and effective working environment for customers and staff	3.1	explain their responsibilities for health and safety in the workplace			
		3.2	explain their responsibilities for maintaining an effective working environment			
		3.3	describe how to access information on legal and regulatory requirements for health and safety and relevant codes of practice			
		3.4	describe the types of health and safety hazards that are likely to occur in their area of responsibility			
		3.5	explain how to assess the risks associated with these health and safety hazards			
		3.6	explain how to control these risks in a way that is consistent with legal and regulatory requirements and codes of practice			
		3.7	explain their organisation's policies and procedures for health and safety			
		3.8	describe the recording and reporting procedures within their organisation that are relevant to maintaining a healthy and safe environment			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 37: Plan, organise and control customer service operations

Unit code: B13

Unit reference number: A/601/1236

QCF level: 4

Credit value: 10

Guided learning hours: 67

Unit summary

Delivering effective customer service is key to winning and maintaining customer loyalty. This requires careful planning and organisation, followed by close monitoring and control of customer service operations. When problems occur, the learner must be able to deal with these problems in a way that leaves their customer with a positive impression of the organisation. This unit is about managing the delivery of services to the customer.

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 plans must provide evidence that they have taken into account:

   a the aims, objectives and targets for their area of responsibility

   b their organisation's customer service strategy

   c their customers' needs and expectations.

5 The learner's evidence must show that their plans include consideration of:

   a time

   b physical resources

   c human resources

   d financial resources.

6 The learner must show that they have negotiated with:

   a front-line staff

   b supervisors or team leaders

   c senior managers.

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

   a qualitative information

   b quantitative information.

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 customer service operations	1.1	analyse customer expectations and define the service offer designed to meet those expectations			
		1.2	develop specific plans that will ensure sustainable and consistent delivery of customer service			
		1.3	identify any contingencies that may occur, assess their risks and develop effective plans to deal with them			
		1.4	plan how they will monitor and evaluate customer service operations			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	supervise customer service operations	2.1	negotiate the availability of people and other resources that they need to implement their customer service delivery plans			
		2.2	develop specific, measurable and realistic targets for the staff who deliver customer service			
		2.3	ensure that planned resources are available when required			
		2.4	brief staff on their objectives and targets			
		2.5	encourage feedback from staff and customers and use their feedback to modify objectives and targets			
		2.6	collect and analyse feedback from customers and staff on customer service operations			
		2.7	evaluate how effectively agreed outcomes and processes are being achieved			
		2.8	modify their plans for customer service operations in the light of their evaluation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	deal with problems relating to customer service operations	3.1	collect information on the nature of the problem and assess the likely impact on the customer			
		3.2	identify the causes of the problem and possible solutions			
		3.3	evaluate possible solutions against customer expectations and organisational needs			
		3.4	select and implement an acceptable solution with the minimum possible disruption to customers			
		3.5	monitor the implementation of the solution and, where necessary, make adjustments			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	understand how to plan, organise and control customer service operations	4.1	explain how to develop plans for customer service operations and what these plans should contain			
		4.2	explain how to identify and work within allocated budgets and time targets for customer service operations			
		4.3	describe the types of contingencies that may occur during customer service operations, how to assess their risks and plan how to deal with them			
		4.4	describe the types of monitoring methods that can be used and the criteria they should select to evaluate the effectiveness of customer service operations			
		4.5	explain how to develop objectives and targets for staff			
		4.6	explain the importance of briefing staff and how to do so effectively			
		4.7	explain the importance of monitoring the quality of their customer service operations			
		4.8	investigate the types of problems that are likely to occur in their customer service operations and how to plan for dealing with these			
		4.9	explain the importance of liaising with customers and colleagues about problems and possible solutions			
		4.10	explain how to identify and evaluate possible solutions			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(*if sampled*)

Unit 38: Review the quality of customer service

Unit code:	B14
Unit reference number:	J/601/1238
QCF level:	4
Credit value:	8
Guided learning hours:	53

Unit summary

People managing customer service need to know how effectively it is being delivered. Without this information, they have no way of knowing if their customers are satisfied and are likely to remain loyal. They also need to know what to do to improve customer service to meet and exceed customer expectations. This unit is about planning how the learner can measure standards of customer service by collecting and analysing information. The learner must develop conclusions and recommendations and then report their findings to relevant people. Most of all, this unit is about approaching the review of customer service quality systematically and making full use of the findings.

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 must include evidence of collecting and analysing information that is:

   a   quantitative

   b   qualitative.

5   The learner's communication of the results of their measurements 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.

6   The learner's evidence must show that they have communicated the results of their measurements to three of these groups of people:

   a   front line staff

   b   supervisors or team leaders

   c   senior managers

   d   colleagues in other departments

   e   service partners.

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 how to measure customer service	1.1	identify the features of customer service delivery that affect customer satisfaction			
		1.2	plan how they will monitor the features of customer service delivery that affect customer satisfaction			
		1.3	plan how they will analyse the information they have collected			
2	collect and analyse information on customer service	2.1	implement their plans for monitoring customer service processes and outcomes			
		2.2	analyse the monitoring information they have collected			
		2.3	compare the conclusions of their analysis with the criteria they identified			
		2.4	adapt their plans if the agreed methods of collecting and analysing information are not proving effective			
		2.5	communicate the results of their measurement of customer service to colleagues			
		2.6	agree actions to improve customer service that result from their measurements and analysis			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	understand how to review the quality of customer service	3.1	explain the importance of measuring the quality of customer service			
		3.2	explain which aspects of the customer service process affect customer satisfaction			
		3.3	explain how to select the criteria they will use for measurement of customer service			
		3.4	explain how to construct representative samples			
		3.5	describe the types of information collection methods they could use			
		3.6	describe methods of analysing information on the quality of service			
		3.7	explain how to identify recommendations that flow from their measurement of customer service			
		3.8	explain the procedures for making recommendations on customer service improvements within their organisation			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(*if sampled*) Date: _____

Unit 39: Build and maintain effective customer relations

Unit code: B15

Unit reference number: L/601/1239

QCF level: 4

Credit value: 8

Guided learning hours: 53

Unit summary

Building and developing effective customer relations is a vital aspect of customer service. Strong customer relations will help the learner's organisation to identify and understand their customers' expectations, encourage a way of working that is based on partnership and mutual trust, and establish and maintain customer loyalty. This unit is about establishing and maintaining such relations. For some organisations this means encouraging loyalty and repeat business from large numbers of customers. For others it is all about nurturing and relating to a smaller number of valued customers who make an important strategic contribution to the organisation's success. This unit is for the learner only if they are in a position to influence the way their organisation determines the level of service offered to different customers.

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 must provide evidence that they can build and maintain relationships with:

   a   potential or new customers

   b   existing customers

   c   customers with particular needs and expectations

   d   customers who have experienced problems with their organisation's services or products.

5   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.

6   The learner must provide evidence that they have collected feedback that is:

   a   qualitative

   b   quantitative

   c   formal

   d   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	establish effective customer relations	1.1	identify the types of customers with whom they should build longer-term customer relations and promote loyalty			
		1.2	communicate with these customers so that they know they are important to the organisation			
		1.3	explain their role, the purpose of making contact and the mutual benefits of building a longer-term relationship			
		1.4	make it clear that they welcome two-way communication about customer expectations			
2	maintain and develop effective customer relations	2.1	keep customers informed and accept criticism from customers openly and constructively			
		2.2	regularly assess whether customer expectations are being consistently met			
		2.3	use their influence and authority in their own organisation to ensure that customer needs are being met and, where possible, exceeded			
		2.4	collect feedback from customers and staff to ensure that solutions are being provided that result in customer satisfaction			
		2.5	analyse customer relations and propose changes that will develop longer-term loyalty to people with authority in their organisation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	understand how to build and maintain customer relations	3.1	identify and prioritise types of customers with whom they should be building a longer-term relationship			
		3.2	describe the most appropriate method of establishing relationships with customers targeted for longer-term relationships			
		3.3	explain the importance of effective communication skills when dealing with customers			
		3.4	explain how to explore and agree with customers the mutual benefits of maintaining and developing a longer-term relationship			
		3.5	explain how to communicate with customers, especially when they are dissatisfied with products and services			
		3.6	explain how to negotiate with customers in a way that balances customer expectations with the expectations of their own organisation			
		3.7	describe the types of compromises that would be acceptable to their organisation when meeting customer expectations			
		3.8	explain how to use their influence and authority in their organisation to meet or exceed customer expectations			
		3.9	describe methods of monitoring customer satisfaction appropriate to their level of authority in the organisation			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 40: Deliver seamless customer service with a team

Unit code: B16

Unit reference number: F/601/1240

QCF level: 4

Credit value: 8

Guided learning hours: 53

Unit summary

Excellent customer service is a team effort. The learner cannot win and maintain the loyalty of customers without pulling together with all the other staff who help to organise the delivery of services or products, interface with the customer or provide back-up to customer service activities. The team probably includes colleagues, senior managers and service partners who are working in other departments or outside organisations but still contribute to customer service delivery. To achieve the organisation's aims and objectives for customer service the learner will need to have effective working relationships with all of these – especially when they urgently need their co-operation and support.

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 show that they have built relationships with members of their organisation from two of these groups of people:

   a   front line staff

   b   supervisors or team leaders

   c   senior managers

   d   colleagues in other departments

   e   service partners.

5   The learner's evidence must show that they have communicated with team members and service partners using two different communication media.

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	build effective working relationships with colleagues	1.1	identify and agree with colleagues team strategies for delivering seamless customer service			
		1.2	share information and knowledge to improve customer service			
		1.3	encourage, accept and respond positively to feedback from colleagues on customer service performance			
		1.4	work with colleagues to deal with conflict constructively			
		1.5	review teamwork strategies for delivering seamless customer service with colleagues			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	build effective relationships with service partners	2.1	identify the service partners who are most significant to delivery of seamless customer service			
		2.2	take opportunities to establish and develop effective working relationships with service partners			
		2.3	ensure that their commitments to service partners and service partners' commitments to them are being fulfilled as agreed			
		2.4	communicate clearly and in good time with service partners on issues that affect those partners and the learner's customers			
		2.5	work together with service partners to resolve customer service problems			
		2.6	work together with service partners to deal with conflict constructively			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	understand how to deliver seamless customer service with a team	3.1	explain how to analyse the contribution and roles of colleagues and service partners when delivering customer service			
		3.2	describe the types of support they could provide to colleagues and service partners and those people could provide to them to deliver seamless customer service			
		3.3	explain the benefits and challenges of collaborative working, what may go wrong and how to prepare for this			
		3.4	explain the value and importance of effective communication with colleagues and service partners			
		3.5	describe the types of behaviours that show they have a relationship of respect and honesty with colleagues and service partners			
		3.6	explain how to deal with conflict constructively			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 41: Recognise and deal with customer queries, requests and problems

Unit code: C1

Unit reference number: M/601/1508

QCF 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

1 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

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

   a   brought to their attention by customers

   b   identified first by them and/or by their colleagues.

5 The problems included in their evidence must include examples of:

   a   a difference between customer expectations and what is offered by their organisation

   b   a problem resulting from a system or procedure failure.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. However, **simulated activities may be used** for the assessment of this unit where workplace assessment is not possible. See Annexe D for further details. 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			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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			
		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: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(if sampled) Date: _____

Unit 42: Take details of customer service problems

Unit code: C2

Unit reference number: T/601/1509

QCF 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

1 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

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

    a   easy to deal with

    b   difficult to deal with.

5   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 a realistic working environment.
However, **simulated activities may be used** for the assessment of this
unit where workplace assessment is not possible. See Annexe D for further
details. 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 43: Resolve customer service problems

Unit code: C3

Unit reference number: M/601/1511

QCF 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

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. 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

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

  a   a problem first identified by customers

  b   a problem identified within the organisation before it has affected the learner's customer

  c   a problem caused by differences between their customer's expectations and what their organisation can offer

  d   a problem caused by a system or procedure failure

  e   a problem caused by a lack of resources or human error.

5   The learner must provide evidence that they:

  a   supplied relevant information when customers have requested it

  b   supplied relevant information when customers have not requested it

  c   have used agreed organisational procedures when solving problems

  d   have made exceptions to usual practice with the agreement of others.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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	discuss and agree the options for solving the problem with their customer			
		3.2	take action to implement the option agreed with their customer			
		3.3	work with others and their customer to make sure that any promises related to solving the problem are kept			
		3.4	keep their customer fully informed about what is happening to resolve the problem			
		3.5	check with their customer to make sure the problem has been resolved to the customer's satisfaction			
		3.6	give clear reasons to their customer when the problem has not been resolved to the customer's satisfaction			
4	know how to resolve customer service problems	4.1	describe organisational procedures and systems for dealing with customer service problems			
		4.2	explain how to defuse potentially stressful situations			
		4.3	describe how to negotiate			
		4.4	identify the limitations of what they can offer their customer			
		4.5	describe types of action that may make a customer problem worse and should be avoided			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(*if sampled*)

Unit 44: Deliver customer service to difficult customers

Unit code: C4

Unit reference number: T/601/1512

QCF 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

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. 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

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

    a   during routine delivery of customer service

    b   during a busy time in their job

    c   during a quiet time in their job

    d   when people, systems or resources have let them down.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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: Monitor and solve customer service problems

Unit code:	C5
Unit reference number:	J/601/1515
QCF level:	3
Credit value:	6
Guided learning hours:	40

Unit summary

The learner's job involves delivering and organising excellent customer service. However good the service provided, some of their customers will experience problems and the learner will spot and solve other problems before their customers even know about them. This unit is about the part of their job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems. Remember that some customers judge the quality of their customer service by the way that the learner solves customer service problems. The learner can impress customers and build customer loyalty by sorting out those problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.

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 with different customers on different occasions for their assessor to be confident that they are competent.

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

   a brought to their attention by customers

   b identified first by them and/or by a colleague.

5 The problems included in the learner's evidence must include examples of a:

   a difference between customer expectations and what is offered by the learner's organisation

   b problem resulting from a system or procedure failure

   c problem resulting from a shortage of resources or human error.

6 The learner must show that they have considered the options for solving problems from the point of view of:

   a their customer

   b the potential benefits to their organisation

   c the potential risks to their organisation.

7 The learner must provide evidence that they have made use of options that:

   a follow organisational procedures or guidelines

   b make agreed and authorised exceptions to usual practice.

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	solve immediate customer service problems	1.1	respond positively to customer service problems following organisational guidelines			
		1.2	solve customer service problems when they have sufficient authority			
		1.3	work with others to solve customer service problems			
		1.4	keep customers informed of the actions being taken			
		1.5	check with customers that they are comfortable with the actions being taken			
		1.6	solve problems with service systems and procedures that might affect customers before customers become aware of them			
		1.7	inform managers and colleagues of the steps taken to solve specific problems			
2	identify repeated customer service problems and options for solving them	2.1	identify repeated customer service problems			
		2.2	identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option			
		2.3	work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of the organisation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	take action to avoid the repetition of customer service problems	3.1	obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated			
		3.2	action their agreed solution			
		3.3	keep their customers informed in a positive and clear manner of steps being taken to solve any service problems			
		3.4	monitor the changes they have made and adjust them if appropriate			
4	understand how to monitor and solve customer service problems	4.1	describe organisational procedures and systems for dealing with customer service problems			
		4.2	describe the organisational procedures and systems for identifying repeated customer service problems			
		4.3	explain how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers			
		4.4	explain how to negotiate with and reassure customers while their problems are being solved			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(if sampled)

Unit 46: Apply risk assessment to customer service

Unit code: C6

Unit reference number: D/601/1519

QCF level: 3

Credit value: 10

Guided learning hours: 67

Unit summary

This unit is about how formal or informal risk assessment techniques can be used to reduce any risks involved in the provision of customer service. The provision of customer service involves a range of risks. These may be financial, reputational or health and safety risks. Awareness of them alone is rarely enough so customer service sometimes involves identifying and assessing individual risks so that they can be classified and prioritised. This in turn enables the learner to take actions to minimise risks.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4 The procedures the learner follows for risk assessment may be formal or informal and may or may not be written.

5   The learner must provide evidence that they have identified risks in their own area of responsibility:

    a   through their everyday work

    b   by actively carrying out a risk assessment

    c   through discussion with colleagues.

6   The learner's evidence must show that when carrying out a risk assessment they have:

    a   listed each risk

    b   identified the consequences of each risk

    c   estimated the probability of each risk occurring

    d   made a judgement about any action that is justified taking into account the consequences and probability of each risk.

7   The learner must provide evidence that they have worked with two of these groups of people to identify possible actions for managing risk:

    a   team members or colleagues

    b   suppliers or service partners

    c   supervisors, team leaders or managers.

8   The learner's evidence must show that they have carried out risk assessments that have caused them to:

    a   take action to manage the risk

    b   decide that the level of risk is tolerable and take no action.

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 analyse customer service processes for risk	1.1	show that they know and understand their organisation's customer service process and the moments of truth (those points in the customer service process that have most impact on the customer experience)			
	1.2	identify the financial risks for each stage of the customer service process			
	1.3	identify the reputational risks for each stage of the customer service process			
	1.4	identify the health and safety risks for each stage of the customer service process			
	1.5	identify the risk of delivering sub-standard services or products for each stage of the customer service process			
	1.6	ensure that your customers are aware of any risks that might impact on them			
	1.7	develop staff awareness of the risks they have identified			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	assess customer service risks and take appropriate actions	2.1	assess the probabilities of each risk that they have identified			
		2.2	assess the consequence of each risk in terms of finance, reputation and health and safety			
		2.3	classify each risk as high, medium or low taking into account its probability and consequences			
		2.4	work with colleagues to identify any actions that might be taken to reduce risk			
		2.5	take appropriate actions to minimise the overall customer service risk profile by adapting procedures			
3	understand how to apply risk assessment to customer service	3.1	describe risk assessment techniques			
		3.2	explain how to evaluate risk according to probability of occurrence and consequences of occurrence			
		3.3	evaluate the nature of potential customer service risks including financial, reputational and health and safety risks			
		3.4	explain cost/benefit analysis			
		3.5	define SWOT (Strengths, Weaknesses, Opportunities, Threats) and PESTLE (Political, Economic, Social, Technological, Legal, Environmental) analysis			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 47: Process customer service complaints

Unit code:	C7
Unit reference number:	D/601/1522
QCF 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

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 with different customers on different occasions for their assessor to be confident that they are competent.

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

   a   justified

   b   unjustified.

5   The learner must provide evidence of processing customer service complaints:

   a   during routine delivery of customer service

   b   during a busy time in their job

   c   during a quiet time in their job

   d   when people, systems or resources have let them down.

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

   a   have different needs and expectations

   b   appear angry or confused

   c   behave unusually.

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

   a   organisational procedures

   b   sector or industry codes of practice

   c   legislation.

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 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			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	deal with a complaint effectively	2.1	ensure that they have a clear understanding of the nature and details of the complaint			
		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			
		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			
		2.4	assess the risks to their organisation of choosing each option			
		2.5	report the findings of their investigation to their customer and offer their chosen solution			
		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			
		2.7	give feedback to other colleagues involved which will help them avoid future complaints			
		2.8	keep clear records of the way the complaint has been handled to avoid later misunderstandings			

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			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.9 describe techniques for handling conflict			
	3.10 explain the importance of dealing with a complaint promptly			
	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: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(*if sampled*)

Unit 48: Handle referred customer complaints

Unit code:	C8
Unit reference number:	K/601/1524
QCF 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

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 with different customers on different occasions for their assessor to be confident that they are competent.

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

   a   qualitative information

   b   quantitative information.

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

   a   prepared to accept their proposed solutions

   b   not prepared to accept their proposed solutions.

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

   a   a difference between customer expectations and what is offered by their organisation

   b   a problem resulting from a system or procedure failure

   c   a problem resulting from a shortage of resources or human error.

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	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			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
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			
	4.6	explain how to devise solutions that balance customer expectations and organisational aims			
	4.7	explain why it is important to identify and present to the customer a range of possible options			
	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			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	4.9 research how to identify trends and patterns in customer complaints and solutions			
	4.10 describe how to explore the implications of these patterns and trends for their organisation' policies and procedures			
	4.11 explain how to recommend changes to organisational policies and procedures			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(if sampled) Date: _____

Unit 49: Develop customer relationships

Unit code: D1

Unit reference number: T/601/1526

QCF level: 2

Credit value: 6

Guided learning hours: 40

Unit summary

When the learner deals with their customers regularly, they want to make each occasion a good customer experience. The impression the learner creates and the way the service is delivered affects this in just the same way as when they deal with a customer only once. However, a longer-term relationship with a repeat customer also depends on building up their customer's confidence in the service that the learner offers. Loyalty and a long-term relationship rely on the customer having a realistic view of the organisation's service and being comfortable with it. The learner's customer will return to their organisation if they feel confident that they will receive excellent service because they have enjoyed good customer experiences with the learner before.

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. 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4   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.

5   The learner must provide evidence of taking actions to meet the needs and expectations of their customer and of their organisation:

a   without being asked by their customer

b   at their customer's request.

6   The learner must include evidence that they have balanced the needs of their customers and their organisation by:

a   making use of alternative products or services offered by the organisation

b   varying the service they would normally offer within organisational guidelines

c   saying 'no' to their customer and explaining the limits of their organisation's service offer.

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	build their customer's confidence that the service they give will be excellent	1.1	show that they behave assertively and professionally with customers			
		1.2	allocate the time they take to deal with their customer following organisational guidelines			
		1.3	reassure their customer that they are doing everything possible to keep the service promises made by the organisation			
2	meet the expectations of their customers	2.1	recognise when there may be a conflict between their customer's expectations and their organisation's service offer			
		2.2	balance their customer's expectations with their organisation's service offer by offering an alternative or explaining the limits of the service offer			
		2.3	work effectively with others to resolve any difficulties in meeting their customer's expectations			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	develop the long-term relationship between their customer and their organisation	3.1	give additional help and information to their customer in response to customer questions and comments about their organisation's services or products			
		3.2	discuss expectations with their customer and explain how these compare with their organisation's services or products			
		3.3	advise others of feedback received from their customer			
		3.4	identify new ways of helping customers based on the feedback customers have given them			
		3.5	identify added value that their organisation could offer to long-term customers			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 know how to develop customer relationships	4.1 describe their organisation's services or products			
	4.2 explain the importance of customer retention			
	4.3 explain how their own behaviour affects the behaviour of the customer			
	4.4 describe how to behave assertively and professionally with customers			
	4.5 describe how to defuse potentially stressful situations			
	4.6 identify the limitations of their organisation's service offer			
	4.7 compare how customer expectations may change as the customer deals with their organisation			
	4.8 identify the cost and resource implications of an extension of the service offer to meet or exceed customer expectations			
	4.9 explain the cost implications of bringing in new customers as opposed to retaining existing customers			
	4.10 identify who to refer to when considering any variation to their organisation's service offer			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(if sampled)

Unit 50: Support customer service improvements

Unit code: D2

Unit reference number: A/601/1530

QCF level: 2

Credit value: 5

Guided learning hours: 33

Unit summary

Organisations change the way they deliver service to their customers because customer expectations rise and because other organisations improve the services they offer. Often the most important ideas about how to improve customer service come from people dealing directly with customers. The learner's job involves delivering customer service. If the organisation has decided to make changes, it is the learner's job to support them and to present them positively to customers. Also, by listening to customer comments the learner may have their own ideas about how the service they deliver could be improved. This unit is about how the learner provides support for changes that their organisation has introduced. In addition, it covers how the learner presents their own ideas for improvements to someone in their organisation who can authorise trying out the change.

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. 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4   The learner must provide evidence that they have:

   a   contributed to improving customer service through their own efforts

   b   contributed to improving customer service by working with others.

5   The learner's evidence must cover two changes with which they have been actively involved. In each case they must be able to identify the part they played in:

   a   linking customer feedback with the reasons for the change

   b   implementing the change

   c   gathering customer reactions to the change.

6   The learner's evidence for each change must show how:

   a   the change has improved customer service

   b   their customers have reacted to the change.

7   Each change that is part of the learner's evidence must be significant enough for a regular customer to notice that the services or products they are delivering are different or that the way they and their colleagues deliver the services or products is different.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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 feedback to identify potential customer service improvements	1.1	gather informal feedback from their customers			
		1.2	use their organisation's procedures to collect feedback from their customers			
		1.3	use the information from their customers to develop a better understanding of their customer service experience			
		1.4	identify ways the service they give could be improved based on information they have gathered			
		1.5	share their ideas for improving customer service with colleagues			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	implement changes in customer service	2.1	identify a possible change that could be made to improve customer service			
		2.2	present their idea for improving customer service to a colleague with the appropriate authority to approve the change			
		2.3	carry out changes to customer service procedures based on their own idea or proposed by their organisation			
		2.4	keep their customers informed of changes to customer service			
		2.5	give customers a positive impression of changes that have been made			
		2.6	work positively with others to support customer service changes			
3	assist with the evaluation of changes in customer service	3.1	discuss with others how changes to customer service are working			
		3.2	work with others to identify any negative effects of changes and how these can be avoided			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
4 know how to support customer service improvements	4.1	explain how customer experience is influenced by the way service is delivered			
	4.2	identify how customer feedback is obtained			
	4.3	explain how to work with others to identify and support change in the way service is delivered			
	4.4	describe why it is important to give a positive impression to their customer about the changes made by the organisation even if the learner disagrees with them			

Learner name: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Date: _____

Unit 51: Develop personal performance through delivering customer service

Unit code: D3

Unit reference number: R/601/1534

QCF level: 2

Credit value: 6

Guided learning hours: 40

Unit summary

Delivering customer service presents many opportunities for learning and for developing personal skills. This unit is about how the learner can develop their personal skills at the same time as improving their customer service performance. The learner will need to plan together with a manager or mentor and then carry out activities which help the learner learn and develop in their customer service role. Customer service improvements rely on continuous improvement and this includes improving the learner's own skills.

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. 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4   An 'appropriate person' must be one or more of the following:

- the learner's manager
- their supervisor or team leader
- a colleague detailed to help them learn
- their assessor
- their mentor
- someone from their training or personnel department.

5   The learner must provide evidence that they have developed their personal development plan taking account of:

a   information about the knowledge and skills relevant to their customer service role

b   their own learning style preferences

c   their workload

d   opportunities for learning on the job.

6   The learner's personal development plan must be put on record and agreed with an appropriate person.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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	review performance in their customer service role	1.1	work with an appropriate person to establish what they need to know, understand and be able to do to work effectively in their customer service role			
		1.2	identify and review situations from their own positive and negative experiences as a customer			
		1.3	carry out a self assessment of their performance in their customer service role and identify their strengths, weaknesses and development needs			
2	prepare a personal development plan and keep it up-to-date	2.1	agree their strengths, weaknesses and development needs with an appropriate person			
		2.2	work with an appropriate person to draw up their own development objectives to improve their performance in their customer service role			
		2.3	develop a customer service personal development plan			
		2.4	regularly review their progress towards their objectives with an appropriate person			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 undertake development activities and obtain feedback on their customer service performance	3.1 complete development activities identified in their customer service personal development plan			
	3.2 use their day to day experiences with their customers and their own experiences as a customer to develop their customer service performance			
	3.3 obtain feedback from an appropriate person about their customer service performance			
	3.4 review and update their customer service personal development plan			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	understand how to develop their personal performance through delivering customer service	4.1	describe their organisation's systems and procedures for developing personal performance in customer service			
		4.2	explain how their behaviour has an effect on the behaviour of others			
		4.3	explain how effective learning depends on a process of planning, doing and reviewing			
		4.4	describe how to review effectively their personal strengths and development needs			
		4.5	describe how to put together a personal development plan that will build on their strengths and overcome their weaknesses in areas that are important to customer service			
		4.6	explain how to access sources of information and support for their learning			
		4.7	explain how to obtain useful and constructive personal feedback from others			
		4.8	describe how to respond positively to personal feedback			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 52: Support customers using on-line customer services

Unit code: D4

Unit reference number: H/601/1540

QCF level: 2

Credit value: 5

Guided learning hours: 33

Unit summary

Many organisations develop their customer service by directing customers towards on-line services. Customer service delivered on-line 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 on-line systems.

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. 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4   The learner must provide evidence of supporting customers who are:

   a   new to the use of on-line services for this particular purpose

   b   familiar with the use of on-line services for this particular purpose.

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

   a   the customer's use of the on-line services

   b   a system or equipment failure.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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 an on-line customer service	1.1	ensure that they are up-to-date with the on-line services that their customers use			
	1.2	identify what the customer is trying to achieve and what they are having difficulties with			
	1.3	question their customer to discover the customer's degree of familiarity with the system			
	1.4	offer their customer the option of trying the on-line approach once more			
	1.5	agree with their customer the exact nature of the problem and steps that may be taken to overcome it			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
2 support on-line customer service in conversation with their customer	2.1	explore the on-line 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 on-line			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 understand how to support customers using on-line services	3.1 explain how their organisation's system for on-line 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 on-line 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 on-line 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 on-line customers			

Learner name: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)   Date: _____

Unit 53: Buddy a colleague to develop their customer service skills

Unit code:	D5
Unit reference number:	M/601/1542
QCF 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

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. 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

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

  a   during routine delivery of customer service

  b   during a busy time in their job

  c   during a quiet time in their job

  d   when people, systems or resources have let them down.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(if sampled) Date: _____

Unit 54: Develop your own customer service skills through self-study

Unit code:	D6
Unit reference number:	R/601/1548
QCF 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

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. 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4 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.

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

   a paper based

   b on-line or other electronic media

   c structured discussions.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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 55: Support customers using self-service technology

Unit code: D7

Unit reference number: Y/601/1549

QCF level: 2

Credit value: 5

Guided learning hours: 33

Unit summary

Many organisations develop their customer service by directing customers towards self-service equipment which is operated by the customer alone. Regular customers become familiar with how that equipment operates and some will feel uncomfortable about being offered further help. Others may be learning about the use of the equipment for the first time or may be experiencing particular problems. Sometimes equipment fails and authorised intervention will be needed to clear it. Whichever is the case, the learner must be able to recognise what help and intervention is needed and to provide that in a way that pleases their customer and builds their confidence in the use of the equipment. This unit is right for the learner if any part of their job involves helping and encouraging customers to operate self-service equipment in order to improve their customer experience.

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. 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.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4   The self–service technology used in the learner's evidence may be any technology used outside the home to allow customers to interact with an organisation and help themselves. Examples include, but are not restricted to, scanning groceries, printing a boarding pass, printing photos, buying from an automated vending machine, and using an electronic kiosk to obtain information or conduct a transaction.

5   The learner must provide evidence of supporting customers who are:

   a   new to the use of self-service equipment for this particular purpose

   b   familiar with the use of self-service equipment for this particular purpose.

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

   a   the customer's use of the technology

   b   a system or equipment failure.

Assessment methodology

This unit is assessed in the workplace or in a realistic working environment. For guidelines on 'realistic working environments' refer to the Appendix F of the Assessment Strategy in Annexe D. 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 the type of help needed by a customer using self-service technology	1.1	prepare a standard demonstration of using the self-service equipment			
		1.2	prepare to answer frequently asked questions about the operation of the self-service equipment			
		1.3	identify signs of when a customer is having difficulty with the self service equipment			
		1.4	choose an appropriate style and level of intervention to help a customer who is having trouble using the self-service equipment			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	assist a customer using self-service technology	2.1	maintain a professional, polite and approachable manner while they observe customers using self-help technology			
		2.2	demonstrate use of the self-service equipment to a customer			
		2.3	respond to a request for help from a customer using self-help equipment			
		2.4	make use of staff override options to clear self-service equipment for use by customers			
		2.5	talk a customer through use of the self-service equipment whilst allowing them to operate it			
		2.6	invite a customer to repeat the operation of the self-service equipment if that helps them to learn			
		2.7	make positive and encouraging comments to a customer who is learning to use the self-service equipment			
		2.8	explain to their customer why certain actions and steps are needed to operate self-service equipment			
		2.9	troubleshoot problems with self-service equipment and report errors and issues to appropriate people			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
3 understand how to support customers using self-service technology	3.1	explain why their organisation chooses to offer customers self-service equipment			
	3.2	explain all aspects of normal operation of the customer self-service equipment			
	3.3	state frequently asked questions about operation of the self-service equipment and effective answers to those questions			
	3.4	describe techniques for giving an effective demonstration of self-service equipment			
	3.5	identify signals and signs that a customer needs help with self-service equipment			
	3.6	describe organisational procedures for using staff intervention to clear self-service equipment			
	3.7	explain the importance of building customer confidence in using self-service equipment			
	3.8	describe organisational procedures for dealing with self-service equipment problems			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 56: Work with others to improve customer service

Unit code: D8

Unit reference number: D/601/1553

QCF 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

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 with different customers on different occasions for their assessor to be confident that they are competent.

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

   a   part of their own role

   b   part of other people's roles.

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

   a   team members or colleagues

   b   suppliers or service partners

   c   supervisors, team leaders or managers.

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

   a   face to face

   b   in writing

   c   by telephone

   d   using text messages

   e   by email

   f   using the internet (including social networking)

   g   using an intranet.

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	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			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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			
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: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(if sampled)

Unit 57:   Promote continuous improvements

Unit code: D9

Unit reference number: H/601/1554

QCF level: 3

Credit value: 7

Guided learning hours: 47

Unit summary

This unit covers the key competence of the customer service professional. The learner must be dedicated to the continuous improvement of customer service and this involves organising changes in the way customer service is delivered over and over again. The learner will need to identify potential changes, think through their consequences and make them work. Above all, this unit covers the competence of organising and seeing through change that is sustainable and is in the spirit of continuous improvement in customer service.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4   The learner must provide evidence that they have organised changes over a period of time which have resulted in sustainable continuous improvement in customer service.

5   The learner must show that their proposals for improvements:

   a   are based on planned and analysed customer feedback

   b   take into account all relevant regulations

   c   take into account the costs and benefits to the organisation.

6   The learner may carry out this work alone or with colleagues. However, they must provide evidence that they have taken an active role in:

   a   collecting and analysing feedback

   b   proposing initiatives for change

   c   implementing the change

   d   evaluating and reviewing the change.

7   The learner's evidence must clearly show the part they have played in each step of the continuous improvement process.

8   The changes that the learner proposes and initiates may be changes in how services or products are supplied or in how they and their colleagues behave when delivering services or products.

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 improvements in customer service based on customer feedback	1.1	gather feedback from customers that will help to identify opportunities for customer service improvement			
		1.2	analyse and interpret feedback to identify opportunities for customer service improvements and propose changes			
		1.3	discuss with others the potential effects of any proposed changes for their customers and their organisation			
		1.4	negotiate changes in customer service systems and improvements with somebody with sufficient authority to approve trial or full implementation of the change			
2	implement changes in customer service	2.1	organise the implementation of authorised changes			
		2.2	implement the changes following organisational guidelines			
		2.3	inform people inside and outside their organisation who need to know of the changes being made and the reasons for them			
		2.4	monitor early reactions to changes and make appropriate fine-tuning adjustments			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	review changes to promote continuous improvement	3.1	collect and record feedback on the effects of changes			
		3.2	analyse and interpret feedback and share their findings on the effects of changes with others			
		3.3	summarise the advantages and disadvantages of the changes			
		3.4	use their analysis and interpretation of changes to identify opportunities for further improvement			
		3.5	present these opportunities to somebody with sufficient authority to make them happen			
4	understand how to promote continuous improvement	4.1	review how service improvements in their area affect the balance between overall customer satisfaction, the costs of providing service and regulatory requirements			
		4.2	explain how customer experience is influenced by the way service is delivered			
		4.3	explain how to collect, analyse and present customer feedback			
		4.4	explain how to make a business case to others to bring about change in the products or services they offer			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(if sampled)

Unit 58: Develop your own and others' customer service skills

Unit code: D10

Unit reference number: K/601/1555

QCF level: 3

Credit value: 8

Guided learning hours: 53

Unit summary

This unit is about taking responsibility for continuously developing the learner's own customer service skills and passing those skills on to others. It is about helping themselves and others to learn and grow in their customer service roles. The learner may not be a manager or a supervisor but they may be responsible for showing others how things work and what they need to do. For example, a new member of staff may need an introduction to the products, services, systems or procedures of their organisation and the learner may be asked to show them. Or the learner may need to coach someone from another department who has been transferred. Also, there may be the introduction of a new product, service, system or procedure that the learner is asked to learn about and present or demonstrate to others. This unit will help the learner to put 'showing others' into a formal framework that will help them to learn and improve their own coaching skills. The delivery of excellent customer service depends on the learner's skills and the skills of those around them.

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 with different customers on different occasions for their assessor to be confident that they are competent.

4   The learner's personal development plan may be based on existing customer service skills and development activities that already take place in their organisation or new activities that they have to devise.

5   The learner must have constructed their personal development plan taking account of information about the knowledge and skills relevant to their:

    a   customer service role

    b   own preferred method of learning

    c   workload

    d   opportunities for learning on the job

    e   opportunities for learning off the job.

6   Feedback about their customer service performance must involve their line manager or supervisor and their evidence must show this.

7   The learner's evidence of coaching may relate either to a single colleague or several colleagues who may be:

    a   new to the organisation or department

    b   new to the job, procedure or system

    c   experienced but seeking to refresh or improve their customer service skills.

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	develop their own customer service skills	1.1	agree with a manager or mentor the specific customer service skills they need in their customer service role			
		1.2	agree the actions they need to take to improve their customer service skills			
		1.3	draw up a personal development plan based on their agreed actions to improve their customer service skills			
		1.4	carry out their personal development activities and review their progress			
		1.5	obtain feedback from their manager or mentor about their customer service performance and update their personal development plan			
2	plan the coaching of others in customer service	2.1	identify and agree with colleagues specific customer service skills and knowledge those colleagues need in their customer service role			
		2.2	identify opportunities for colleagues to take actions to develop their customer service skills			
		2.3	plan and organise activities and coaching sessions for colleagues to help them develop their customer service skills			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	coach others in customer service	3.1	coach colleagues to develop specific and agreed customer service skills			
		3.2	give colleagues the opportunity to practise skills, apply knowledge and gain experience to develop customer service competence			
		3.3	regularly check the progress of colleagues and modify their coaching as appropriate			
		3.4	give regular feedback to colleagues about the progress they are making			
		3.5	explain clearly to colleagues how on-going support will be provided			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	understand how to develop their own and others' customer service skills	4.1	describe organisational systems and procedures for developing their own and others' personal performance in customer service			
		4.2	explain how their behaviour impacts on others			
		4.3	explain how to review effectively their personal strengths and development needs			
		4.4	describe how to put together a personal development plan for themselves or a colleague that will build on strengths and overcome weaknesses in areas that are important to customer service			
		4.5	explain how to obtain useful and constructive personal feedback from others			
		4.6	describe how to respond positively to personal feedback			
		4.7	describe how to put together a coaching plan that will build on their strengths and overcome their weaknesses in areas that are important to customer service and their job role			
		4.8	explain how to give useful and constructive personal feedback to others			
		4.9	describe how to help others to respond positively to personal feedback			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(if sampled)

Unit 59: Lead a team to improve customer service

Unit code: D11

Unit reference number: H/601/1568

QCF 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

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 with different customers on different occasions for their assessor to be confident that they are competent.

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

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

   a   time

   b   human resources

   c   physical resources

   d   financial resources.

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

   a   existing workloads

   b   individual capabilities and sensitivities

c   initiatives and objectives currently being undertaken by the organisation

   d   influences operating on the team from outside.

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

   a   plan and organise their work

   b   provide support and guidance

   c   give and seek feedback on performance.

8   The feedback the learner provides to team members may be:

   a   formal or informal

   b   verbal or in writing.

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 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 60: Gather, analyse and interpret customer feedback

Unit code:	D12
Unit reference number:	H/601/1571
QCF 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

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 with different customers on different occasions for their assessor to be confident that they are competent.

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

    a   using informal methods such as conversation and observation of customer reactions

    b   using two different formal methods such as questionnaire, telephone or interview surveys.

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

    a   using a method they have devised

    b   following established organisational procedures.

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

    a   in tabulated form

    b   in graphical or pictorial form.

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 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			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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 61: Monitor the quality of customer service transactions

Unit code:	D13
Unit reference number:	T/601/1574
QCF 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 on-line, 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

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 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. 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	1.1	identify the criteria against which quality of customer service transactions will be monitored			
	1.2	agree a sampling frame for monitoring customer service transactions			
	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			
	1.4	identify ratings and scales against which quality of customer service transactions can be measured			
	1.5	ensure that they are totally familiar with the customer service procedures for transactions they are monitoring			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	monitor the quality of customer service transactions	2.1	carry out spot checks on or observations of the quality of customer service transactions			
		2.2	carry out planned and routine checks on or observations of the quality of customer service transactions			
		2.3	observe or listen to a colleague dealing with a customer service transaction			
		2.4	record their observations of a colleague's performance against agreed quality criteria			
		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			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
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			

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

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(*if sampled*) Date: _____

Unit 62: Implement quality improvements to customer service

Unit code: D14

Unit reference number: L/601/1578

QCF 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:

   a   time

   b   human resources

   c   physical resources

   d   financial resources.

5   The learner must provide evidence of communicating with:

   a   customers

   b   front-line staff

   c   colleagues

   d   supervisors/team leaders

   e   senior managers

   f   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:

   a   quantitative

   b   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			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	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			
	4.9	describe the types of support that staff may need when improvements are being implemented and how to provide such support			
	4.10	explain why it is important to complete change on time and within budget			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(*if sampled*) Date: _____

Unit 63: Plan and organise the development of customer service staff

Unit code: D15

Unit reference number: L/601/1581

QCF level: 4

Credit value: 9

Guided learning hours: 60

Unit summary

Achieving excellent customer service depends on the skills and knowledge of the staff who provide it. To be effective, organisations need to review constantly how effective their customer service is and what improvements should be made. Sometimes customer service improvements will depend on the development of staff skills. New staff must be brought to the required standards of skills and knowledge and established staff need to be updated on new procedures and techniques or refreshed on existing ones. Senior customer service staff have an important contribution to make to this process. This unit is about identifying what development and training is needed for staff, organising its delivery and monitoring its success.

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 show that they have been involved with the training and development of staff from two of the following groups:

   a new staff

   b existing staff

   c front-line staff

   d supervisors and team leaders

   e part-time staff

   f support staff

   g service partners.

5 The learner must show that they monitor the performance of staff involved in development and training activities through:

   a formal monitoring mechanisms such as appraisals and Key Performance Indicators (KPIs)

   b informal and more immediate monitoring such as direct supervision.

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 customer service staff development and training needs	1.1	identify where customer service could be improved through staff training and development			
		1.2	help staff providing customer service to identify their own development and training needs			
		1.3	help staff to identify how they learn best			
		1.4	agree the types of staff development and training activities that are needed			
		1.5	report staff development needs to relevant people in your organisation			
2	organise customer service development and training	2.1	agree the aims and objectives of the customer service development and training activities			
		2.2	agree the type and style of customer service development and training that are appropriate			
		2.3	agree the detailed design of customer service development and training activities			
		2.4	organise customer service development and training activities			
		2.5	monitor the performance of staff involved in the development and training activities to be sure that learning is put into practice			
		2.6	organise additional help and training for staff where this is needed			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	understand how to plan and organise the development of customer service staff	3.1	explain the importance of continuously developing staff that provide customer service			
		3.2	describe current objectives and targets that relate to customer service in their area of responsibility			
		3.3	identify when development and training could improve customer service performance			
		3.4	describe the range of types and styles of development and training and how to select those that are appropriate to customer service, their organisation, and specific training and development needs			
		3.5	explain why it is important that they should have an input into the design and delivery of customer service development and training for their staff			
		3.6	describe how they can help staff to put into practice what they have learned			
		3.7	explain how to assess the impact that development and training has had on customer service performance			
		3.8	describe the types of additional support they could provide to staff following development and training			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 64: Develop a customer service strategy for a part of an organisation

Unit code: D16

Unit reference number: M/601/1587

QCF level: 4

Credit value: 11

Guided learning hours: 73

Unit summary

If organisations want to be consistently successful in customer service over a period of time, they need a customer service strategy. Managers and other senior staff can contribute to this through their knowledge of the organisation's customers and their expertise in customer service. This contribution is also based on what they know of other organisations and published research into trends in customer service. This unit does not assume the learner has full responsibility for their organisation's customer service strategy but that the learner takes a major role in the development of strategy for a particular part of their organisation.

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 should be able to identify and analyse the needs and expectations of:

   a existing customers

   b potential or new customers.

5 The learner's evidence of the approach taken by other organisations may relate to competitors or to organisations that provide similar services or products but are not competitors.

6 The mission, aims, objectives, targets and values of the learner's organisation may be expressed formally or informally.

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 research and evaluate their organisation's business and customer service strategy	1.1	identify their organisation's values, aims and objectives			
	1.2	identify the role of a given part of the organisation in achieving the strategy			
	1.3	evaluate the implications of the strategy for customer service in this part of the organisation			
	1.4	confirm the implications of the strategy for customer service with colleagues			
	1.5	collect information on and analyse customer expectations			
	1.6	match customer expectations with the customer service implications of the business strategy for a given part of their organisation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	help to identify current and future best practice in customer service	2.1	identify other organisations which represent models of good practice in customer service			
		2.2	evaluate the key features of customer service in these organisations and the principles that underpin their approaches			
		2.3	identify and analyse current research on trends and developments in customer service			
		2.4	identify and analyse relevant legal and regulatory requirements, codes of practice and ethical considerations			
		2.5	explore the implications of their research for the part of the organisation they are working in			
		2.6	discuss the outcomes of their research with colleagues			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	identify and recommend the key features of a customer service strategy	3.1	identify values, aims and objectives that are consistent with their research			
		3.2	identify contact processes and channels for customer service that are consistent with their values, aims and objectives			
		3.3	identify how they will evaluate the effectiveness of the strategy			
		3.4	discuss with colleagues the key features of a customer service strategy			
		3.5	construct a customer service strategy for the chosen part of the organisation and agree it with colleagues and managers			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	understand how to develop a customer service strategy for an area	4.1	evaluate the importance of having a customer service strategy for a given part of the organisation			
		4.2	describe how to access information on their organisation's overall business strategy and analyse its implications			
		4.3	describe sources of information they can use to find out about their customers and their expectations			
		4.4	evaluate the importance of customer loyalty and customer service practices that can help to retain loyalty			
		4.5	explain how to identify other organisations which might represent models of best practice in customer service			
		4.6	describe sources of research on trends and developments in customer service			
		4.7	explain how to develop values, aims and objectives relevant to customer service			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)   Date: _____

Unit 65:   Manage a customer service award programme

Unit code: D17

Unit reference number: A/601/1592

QCF level: 4

Credit value: 7

Guided learning hours: 47

Unit summary

This unit is about the competences involved in managing a customer service award programme. A customer service award programme can make a valuable contribution to the organisation's customer service strategy. It serves the dual role of motivating team members and displaying to customers the learner's commitment to customer service. Whilst such a programme must be managed like any other management project, its dual purpose means that each management action associated with it must take full account of the strategic customer service implications.

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 award programmes used in the learner's evidence may relate to individuals, teams, special projects, trainees, incentive schemes or customer nominated awards.

5   The learner must provide evidence that they have planned details of their award programme that include:

   a   the criteria for making the award

   b   what the award will be

   c   the frequency of the award

   d   the procedure for judging the award

   e   how the award will be presented and publicised.

6   The business case for the award programme may be made formally or informally.

7   The learner's evidence must show that they have evaluated the customer service award programme from the point of view of:

   a   benefits to the organisation

   b   benefits to the supervisors and managers of the winners

   c   the effect on the winner or winners

   d   the effect on others who are not winners.

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 a customer service award programme	1.1	identify all the possible options for a customer service award scheme drawing on examples inside and outside of their own organisation			
		1.2	identify the benefits and drawbacks of each option for a customer service award programme			
		1.3	choose the option for a customer service award programme that best suits their customer satisfaction and team motivation objectives			
		1.4	plan the details of their chosen customer service award programme			
		1.5	identify the benefits and costs of their chosen customer service award programme in relation to customer satisfaction and team motivation			
		1.6	make a business case for the introduction of a customer service awards programme or for the development of an existing programme			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
2 implement and manage a customer service award programme	2.1	launch developments in the customer service award programme in a way that informs and motivates customers and team members			
	2.2	ensure that the criteria for the customer service awards are transparent and are considered fair by team members			
	2.3	publicise the customer service awards programme to customers in a way that demonstrates organisational commitment to excellent customer service			
	2.4	organise the judging of individual and team awards in a way that means the results can be justified to the organisation as a whole			
	2.5	announce the results and present the awards in a manner that suits the culture of their organisation and customer service team			
	2.6	review and evaluate the effects of the customer service awards programme on customers and team members			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	understand how to manage a customer service award programme	3.1	explain the principles of motivation and in particular the importance of recognition as a motivator			
		3.2	explain how to make use of customer service award programmes as promotional tools to give added value to customer satisfaction			
		3.3	compare the benefits and drawbacks of different rewards associated with award programmes			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 66:   Apply technology or other resources to improve customer service

Unit code: D18

Unit reference number: Y/601/1597

QCF 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	1.1	monitor developments in technology and the use of other resources to improve customer service			
		1.2	review customer service delivery systems with specific reference to use of resources and technology			
		1.3	identify opportunities and options for improving customer service by applying technology or other resources			
		1.4	analyse the customer service benefits that could result from options for improvement			
		1.5	specify the changes in technology or other resources needed to deliver the options			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	evaluate options for applying technology or other resources to improve customer service	2.1	identify the options for improving customer service with the application of technology or other resources			
		2.2	establish the costs associated with each option for improving customer service			
		2.3	list and where possible quantify the benefits from each option for improving customer service			
		2.4	estimate the affordability of each option to improve customer service			
		2.5	recommend the most appropriate options for implementation			
		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			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
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: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(*if sampled*)   Date: _____

Unit 67: Review and re-engineer customer service processes

Unit code: D19

Unit reference number: R/601/1601

QCF level: 4

Credit value: 11

Guided learning hours: 73

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:

   a   people in other departments or sections of the organisation

   b   internal customers

   c   external customers

   d   internal suppliers

   e   service partners

   f   service delivery colleagues

   g   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	1.1	define the boundaries of a customer service process			
		1.2	agree with the appropriate people the boundaries of the customer service process to be reviewed			
		1.3	set parameters for the types of change that might be made during the re-engineering			
		1.4	communicate with everybody involved regarding the aims of the review			
2	analyse the customer service process and identify improvement opportunities	2.1	identify all the key steps in the customer service process			
		2.2	analyse each step in the customer service process in fine detail			
		2.3	assess each step in the customer service process with reference to customer satisfaction, costs and compliance with relevant regulation			
		2.4	raise questions about each step in the current process to establish where there is scope for development and improvement			
		2.5	explore all the questions raised with those involved in the process and their managers			
		2.6	identify options for re-engineering improvements that deserve further investigation			

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			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
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 68: Manage customer service performance

Unit code: D20

Unit reference number: K/601/1605

QCF level: 4

Credit value: 7

Guided learning hours: 47

Unit summary

Customer service performance can be measured by a wide variety of metrics and ratings collected in different ways by different organisations. Those measurements are needed if the learner is to be able to manage performance systematically and take positive actions for improvement. Information on performance must be collected and interpreted in order to identify appropriate management actions to promote improvement. This may involve reference to standards, benchmarks, targets and tolerances and also the identification of trends and patterns in the evidence that is monitored. This unit is about those monitoring and management processes. This unit is for the learner if they have responsibility for the customer service performance of individuals or a team and they have the authority to see management actions through.

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 techniques used in the learner's evidence for interpreting customer service performance statistics and identifying trends may be any which are practical for their organisation.

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	monitor performance in customer service operations	1.1	collect regular statistics on customer service operations performance			
		1.2	interpret broad patterns of customer service operations statistics			
		1.3	investigate questions raised by interpretation and analysis of performance			
		1.4	interpret statistics regarding customer service performance in specific product and service areas			
		1.5	match customer service performance statistics to benchmarks, targets, standards or agreed tolerances			
		1.6	use customer service performance statistics to identify trends			
		1.7	compare customer service performance statistics with broader quality monitoring results			
		1.8	review resource provision to identify any resource changes needed to improve customer service performance management			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	take management actions to improve performance in customer service operations	2.1	identify management actions to maintain and improve on customer service performance			
		2.2	summarise monitoring evidence to support the case for management actions to improve performance			
		2.3	brief team members on changes they must make to improve customer service performance			
		2.4	organise resource changes needed to improve customer service performance			
		2.5	organise suitable coaching or training to improve customer service performance where development needs have been identified			
		2.6	adjust customer service performance targets which have ceased to be both challenging and achievable			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
3 understand how to manage customer service performance	3.1	explain methods for collecting statistics on customer service operations performance			
	3.2	explain techniques for interpreting customer service performance statistics			
	3.3	explain the importance of setting targets that are SMART (Specific, Measurable, Achievable, Realistic, Time-bound)			
	3.4	identify sources of benchmarks and standards for customer service performance			
	3.5	explain techniques for identifying trends and patterns in customer service performance			
	3.6	compare options for management actions that will improve customer service performance			
	3.7	describe methods of coaching and training to improve customer service performance			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*) Date: _____

Further information

Our customer service numbers are:

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

Calls may be recorded for training purposes.

Useful publications

Related information and publications include:

- *Centre Handbook for Edexcel QCF NVQs and Competence-based Qualifications* published annually

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

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

- the current Edexcel publications catalogue and update catalogue.

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

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

How to obtain National Occupational Standards

To obtain the National Occupational Standards go to www.ukstandards.org.uk.

Professional development and training

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

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.

Annexe A: Progression pathways

The Edexcel qualification framework for the Customer Service sector

Level	General qualifications	Diplomas	BTEC vocationally-related qualifications	BTEC specialist qualification/ professional	NVQ/competence
4					Edexcel Level 4 NVQ Diploma in Customer Service (QCF) Edexcel Level 4 NVQ for Contact Centre Professionals
3				Edexcel BTEC Level 3 Award in Customer Service (QCF) Edexcel BTEC Level 3 Certificate in Customer Service (QCF) Edexcel BTEC Level 3 Award in Contact Centre Supervisory Skills	Edexcel Level 3 NVQ Diploma in Customer Service (QCF) Edexcel Level 3 NVQ for Contact Centre Professionals Edexcel Level 3 NVQ in Telesales

Level	General qualifications	Diplomas	BTEC vocationally-related qualifications	BTEC specialist qualification/ professional	NVQ/competence
2				Edexcel BTEC Level 2 Award in Customer Service (QCF) Edexcel BTEC Level 2 Certificate in Customer Service (QCF) Edexcel BTEC Level 2 Award in Contact Centre Skills	Edexcel Level 2 NVQ Certificate in Customer Service (QCF) Edexcel Level 2 NVQ in Contact Centre Operations Edexcel Level 2 NVQ in Telesales
1				Edexcel BTEC Level 1 Award in Customer Service	Edexcel Level 1 NVQ Certificate in Customer Service (QCF) Edexcel Level 1 NVQ in Contact Centre Operations

Annexe B: Quality assurance

Key principles of quality assurance

- A centre delivering Edexcel qualifications must be an Edexcel 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 around the effective delivery and quality assurance of assessment; the centre must abide by these conditions throughout the period of delivery.

- Edexcel 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 Edexcel 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 for 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 Edexcel. Edexcel is committed to ensuring that it follows best practice and employs appropriate technology to support quality assurance process where practicable. Therefore, the specific arrangements for working with centres will vary. Edexcel seeks to ensure that the quality assurance processes that it uses do not place undue bureaucratic processes on centres and works to support centres 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. Edexcel operates a quality assurance process, which is 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 Edexcel.

The Edexcel quality assurance processes will involve:

- gaining centre recognition and qualification approval if a centre is not currently approved to offer Edexcel qualifications

- annual visits to centres by Edexcel for quality review and development of overarching processes and quality standards. Quality review and development visits will be conducted by an Edexcel quality development reviewer

- annual visits by occupationally competent and qualified Edexcel 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 C: Centre certification and registration

Edexcel Standards Verifiers will provide support, advice and guidance to centres to achieve Direct Claims Status (DCS). Edexcel will maintain the integrity of Edexcel QCF NVQs through ensuring that the awarding of these qualifications is secure. Where there are quality issues identified in the delivery of programmes, Edexcel will exercise the right to:

- direct centres to take actions
- limit or suspend certification
- suspend registration.

The approach of Edexcel in such circumstances is to work with the centre to overcome the problems identified. If additional training is required, Edexcel 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 Edexcel qualifications with integrity.

Appropriate steps should be taken to assess each applicant's potential and a professional judgement 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 Edexcel's policy on learners with particular requirements.

Edexcel's policy on access arrangements and special considerations for Edexcel qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the 1995 Disability Discrimination Act and the amendments to the Act) without compromising the assessment of skills, knowledge, understanding or competence. Please refer to *Access Arrangements and Special Considerations for BTEC and Edexcel NVQ Qualifications* for further details. www.edexcel.com.

Annexe D: Assessment strategy

1. External Quality Control

1a Monitoring Centre Performance

Awarding Organisations/Bodies should:

- carry out thorough risk assessments of organisations applying to become Approved Centres for the Customer Service Level 1, 2, 3 and 4 S/NVQs

- apply quality control management measures appropriate to assess each centre's risk.

1b External Verification

Awarding Organisations/Bodies will appoint External Verifiers and will monitor all External Verifier practices.

In particular the AO/B will:

- seek centre feedback regarding the performance of External Verifiers and act on this feedback

- ensure that centres have requested feedback from their employers in the feedback process

- ensure that External Verifiers follow the relevant regulatory code of practice for EVs and if no code of practice is developed Awarding Organisations/Bodies will develop their own and apply it

- ensure that where a Realistic Working Environment is used IVs and EVs carry out a full examination of the working practices and the assessment process.

2. Assessor, Internal and External Verifier Occupational Competence

2a Customer Service Awarding Organisations/Bodies will facilitate Assessment, Internal and External Verification by ensuring that EVs have:

- a thorough knowledge of the Level 1, 2, 3 or 4 National Occupational Standards for Customer Service, appropriate to the Level the EV is working at, and the ability to interpret them across a wide variety of customer service environments;

- experience and working knowledge of the operational and assessment processes of the Customer Service S/NVQ at the Level the EV is working at;

- relevant and credible customer service experience across the level and breadth of the National Occupational Standards and S/NVQs at the Level the EV is working at;

- knowledge of current customer service practice and emerging issues in the customer service arena;

- high levels of communication and interpersonal skills.

Level 1   The table at Appendix A shows the ICS requirements for the Occupational Competence of Assessors, Internal and External Verifiers at Level 1.

Level 2   The table at Appendix B shows the ICS requirements for the Occupational Competence of Assessors, Internal and External Verifiers at Level 2.

Level 3   The table at Appendix C shows the ICS requirements for the Occupational Competence of Assessors, Internal and External Verifiers at Level 3.

Level 4   The table at Appendix D shows the ICS requirements for the Occupational Competence of Assessors, Internal and External Verifiers at Level 4.

In these tables the ICS has suggested some ways in which Awarding Organisations/Bodies can gain evidence to meet these requirements – these are not compulsory, just a guide. The tick boxes on the right show whether the evidence applies to Assessors (A), Internal Verifiers (IV) or External Verifiers (EV).

2b Awarding Organisations/Bodies and the ICS will work together to:

- circulate and disseminate information appropriate to the job role, from the ICS, to all EVs when this supports the Awarding Organisations'/Bodies' communication strategy/schedule;

- advise EVs of the availability of the ICS web pages;

- hold briefings for External Verifiers about the revised Customer Service Standards and S/NVQs;

- encourage EVs to take part in ICS events regarding the Customer Service Standards and S/NVQs whenever this is felt appropriate;

3. Simulation and Realistic Workplace Performance

Wherever possible, assessment of the Customer Service National S/NVQ Units should be carried out in a real job (either paid or voluntary). Where this is not possible this Assessment Strategy does allow for:

3a The use of simulation for the following Level 1 S/NVQ Units only:

- C1 Recognise and deal with customer queries, requests and problems

- C2 Take details of customer service problems

To undertake assessment of simulated activities for the units above the Guidelines for Simulation shown at Appendix E must be met.

3b The use of a Realistic Working Environment including work experience and work placement is allowed for all Units in the Level 1 and Level 2 S/NVQ

To undertake assessment in a Realistic Working Environment the Guidelines shown at Appendix F must be met.

All other units must be achieved in a real working situation (either paid or voluntary).

4. Employer Direct Model

The ICS feels that the Employer Direct Model of in-house assessment will encourage more employers to offer the Customer Service SVQs and NVQs, particularly when they often have highly trained and experienced assessors, managers and trainers already in situ who meet or exceed the requirements of the A1 and V1 qualifications. Wherever possible, the ICS works with employers to encourage assessment to be carried out by colleagues, supervisors and/or managers in a workplace environment. However, many employers see gaining the A1 and V1 units as an obstacle and unnecessary given the experience and quality of their own internal assessors and trainers.

The Employer Direct Model has been developed to meet the needs of specific employers based on their knowledge of the Customer Service NOS and qualifications and their history of internal assessor/internal verifier expertise.

The ICS supports this model with several provisos:

The organisation must:

- liaise with an Awarding Organisation/Body who will be offering the qualification prior to beginning the process
- prepare, validate and review the assessment/verification roles
- carry out 100% mapping of the employer's training to the National Occupational Standards for the A and V units which the qualifications are based on
- agree the mapping process with the Awarding Organisation/Body involved
- demonstrate an equivalent level of rigour and robustness as the achievement of the unit qualification

The Awarding Organisation/Body must:

- offer this model to employers only
- inform the ICS of employers who are using this model
- supply the ICS with statistical data including take-up, sector, size of organisation etc. when requested
- keep the ICS informed of any problems/issues incurred in the delivery of this model

Appendix A

The Assessor, IV and EV working at Level 1 must have:		This can be evidenced by:	A	IV	EV
1	A thorough understanding of the National Occupational Standards in Customer Service at Level 1 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
		explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
2	Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Organisations/Bodies, UKCES, Accreditation Bodies and the ICS		✓	✓
		explaining the differences between the 4 UK countries	✓	✓	✓
3	Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
		attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
		reading Customer Service publications and articles	✓	✓	✓
		regularly looking at the ICS website for new developments	✓	✓	✓
		keeping up to date with media news regarding Customer Service	✓	✓	✓
		joining the ICS	✓	✓	✓

The Assessor, IV and EV working at Level 1 must have:	This can be evidenced by:	A	IV	EV
4	Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service S/NVQ Level 1	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
5	Sufficient, relevant and credible Customer Service experience across the level and breadth of the Standards and S/NVQs at Level 1	gathering feedback from a variety of employers and centres	✓	✓	✓
		curriculum vitae and references/testimonies	✓	✓	✓
6	Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVs and within 12 months for EVs. In Scotland all Assessors and Verifiers should provide evidence of CPD to show that they are working to the A and/or V unit standards where appropriate; those not yet qualified should show that they are working towards achieving the appropriate units.	producing certificates or evidence of working towards these units or by taking part in an Employer Direct Model in partnership with an Awarding Organisation/Body	✓	✓	✓
7	Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

Appendix B

The Assessor, IV and EV working at Level 2 must have:		This can be evidenced by:	A	IV	EV
1	A thorough understanding of the National Occupational Standards in Customer Service at Level 2 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
		explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
2	Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Organisations/Bodies, UKCES, Accreditation Bodies and the ICS		✓	✓
		explaining the differences between the 4 UK countries	✓	✓	✓
3	Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
		attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
		reading Customer Service publications and articles	✓	✓	✓
		regularly looking at the ICS website for new developments	✓	✓	✓
		keeping up to date with media news regarding Customer Service	✓	✓	✓
		joining the ICS	✓	✓	✓

The Assessor, IV and EV working at Level 2 must have:		This can be evidenced by:	A	IV	EV
4	Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service S/NVQ Level 2	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
		achieving or working towards the Level 2, 3 or 4 Customer Service S/NVQ	✓	✓	✓
5	Sufficient, relevant and credible Customer Service experience across the level and breadth of the Standards and S/NVQs at Level 2	gathering feedback from a variety of employers and centres	✓	✓	✓
		curriculum vitae and references/testimonies	✓	✓	✓
6	Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVs and within 12 months for EVs. In Scotland all Assessors and Verifiers should provide evidence of CPD to show that they are working to the A and/or V unit standards where appropriate; those not yet qualified should show that they are working towards achieving the appropriate units.	producing certificates or evidence of working towards these units or by taking part in an Employer Direct Model in partnership with an Awarding Organisation/Body	✓	✓	✓
7	Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

Appendix C

The Assessor, IV and EV working at Level 3 must have:		This can be evidenced by:	A	IV	EV
1	A thorough understanding of the National Occupational Standards in Customer Service at Level 3 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
		explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
2	Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Organisations/Bodies, UKCES, Accreditation Bodies and the ICS		✓	✓
		explaining the differences between the 4 UK countries	✓	✓	✓
3	Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
		attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
		reading Customer Service publications and articles	✓	✓	✓
		regularly looking at the ICS website for new developments	✓	✓	✓
		keeping up to date with media news regarding Customer Service	✓	✓	✓
		joining the ICS	✓	✓	✓

The Assessor, IV and EV working at Level 3 must have:		This can be evidenced by:	A	IV	EV
4	Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service S/NVQ Level 3	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
		achieving or working towards the Level 2, 3 or 4 Customer Service S/NVQ	✓	✓	✓
5	Sufficient, relevant and credible Customer Service experience across the level and breadth of the Standards and S/NVQs at Level 3	gathering feedback from a variety of employers and centres	✓	✓	✓
		curriculum vitae and references/testimonies	✓	✓	✓
6	Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVs and within 12 months for EVs. In Scotland all Assessors and Verifiers should provide evidence of CPD to show that they are working to the A and/or V unit standards where appropriate; those not yet qualified should show that they are working towards achieving the appropriate units.	producing certificates or evidence of working towards these units or by taking part in an Employer Direct Model in partnership with an Awarding Organisation/Body	✓	✓	✓
7	Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

The Assessor, IV and EV working at Level 4 must have:		This can be evidenced by:	A	IV	EV
1	A thorough understanding of the National Occupational Standards in Customer Service at Level 4 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
		explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
2	Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Organisations/Bodies, UKCES, Accreditation Bodies and the ICS		✓	✓
		explaining the differences between the 4 UK countries	✓	✓	✓
3	Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
		attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
		reading Customer Service publications and articles	✓	✓	✓
		regularly looking at the ICS website for new developments	✓	✓	✓
		keeping up to date with media news regarding Customer Service	✓	✓	✓
		joining the ICS	✓	✓	✓

The Assessor, IV and EV working at Level 4 must have:		This can be evidenced by:	A	IV	EV
4	Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service S/NVQ Level 4	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
		achieving or working towards the Level 2, 3 or 4 Customer Service S/NVQ	✓	✓	✓
5	Sufficient relevant and credible Customer Service experience across the level and breadth of the Standards and S/NVQs at Level 4	gathering feedback from a variety of employers and centres	✓	✓	✓
		curriculum vitae and references/testimonies	✓	✓	✓
6	Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVs and within 12 months for EVs. In Scotland all Assessors and Verifiers should provide evidence of CPD to show that they are working to the A and/or V unit standards where appropriate; those not yet qualified should show that they are working towards achieving the appropriate units.	producing certificates or evidence of working towards these units or by taking part in a Employer Direct Model in partnership with an Awarding Organisation/Body	✓	✓	✓
7	Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

Appendix E

Simulated Activities Guidelines for Customer Service National Occupational Standards

Simulation can only be applied to the Level 1 S/NVQ Units listed below

- C1 Recognise and deal with customer queries, requests and problems
- C2 Take details of customer service problems

Simulation is defined by the ICS as any activities where dealing with customers and work activities are carried out through using individuals acting the part of the customer or scenarios which are not 'real' customer transactions.

To undertake the assessment of simulated activities for these two units the following guidelines must be met:

a   when role playing, candidates and anybody taking part as a customer must have a brief that gives sufficient information for them to recognise the equivalent real situation and decide what they would do and say;

b   the simulated situation should represent normal and routine experience wherever possible and not exceptional or unusually difficult circumstances that might be faced;

c   the person taking part in the simulation as a customer must be credible for the situation that is being simulated;

d   any resources or equipment that would normally be in real work should be available and in working order for the simulation;

e   candidates should complete the required tasks to the National Occupational Standards and in the timescales that would normally be expected in real work;

f   candidates should complete the required tasks taking account of legislation and regulation that would apply in real work;

g   candidates must carry out the simulated activity in a professional manner taking into account establishment requirements such as appearance and dress code, personal conduct, hygiene, reliability and punctuality;

h   whilst the primary purpose of the simulation is for assessment, feedback must be given in a way that builds confidence.

Appendix F

Realistic Working Environment Guidelines for Customer Service National Occupational Standards

RWE can be applied to all units in the Level 1 and 2 S/NVQs

It is essential that organisations wishing to operate a Realistic Working Environment (RWE) operate in an environment which reflects a real work setting. This will ensure that any competence achieved in this way will be sustained in real employment.

To undertake the assessment in a RWE the following guidelines must be met:

a   assessments must be carried out under realistic business pressures, using real customers and within a defined service offer;

b   all services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations;

c   candidates must be expected to achieve a volume of work comparable to normal business practices;

d   the range of services, products, tools, materials and equipment that the candidates use must be up to date and available. They must enable candidates to meet the requirements of the National Occupational Standards;

e   account must be taken of any legislation or regulations in relation to the type of work that is being carried out;

f   candidates must be given workplace responsibilities to enable them to meet the requirements of the Customer Service National Occupational Standards at Level 2;

g   candidates must show that their productivity reflects that found in the work situation being represented.