

SVQ2 in Customer Service at SCQF Level 5

Candidate Logbook

SVQ

October 2012

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Section 1: SVQ2 in Customer Service at SCQF Level 5

Introduction

This document contains information specific to the Level 5 SVQ in Customer Service.

National Occupational Standards and SVQs

The standards, Assessment Strategy and qualification structures for Customer Service are owned by the Council for Administration (CfA) who reviewed these National Occupational Standards. The SVQs have been developed from the National Occupational Standards.

The Edexcel Level 5 SVQ in Customer Service gives recognition of candidates' skills, knowledge and understanding. It allows candidates to gain a qualification in the workplace that relates to their job and promotes good working practice.

You can contact the Standard Setting Body (SSB) at:

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

Telephone: 020 7091 9620
Fax: 020 7091 7340
Email: info@cfa.uk.com
Website: www.cfa.uk.com

SVQs are designed to be assessed in the workplace, or in conditions resembling the workplace. However, simulation of real working practice might be permitted. Where this is allowed it will be shown in the individual units, within the standards that are in this logbook.

Which SVQs in Customer Service are available?

The SVQs in Customer Service are available as follows:

- SVQ2 in Customer Service at SCQF Level 5
- SVQ3 in Customer Service at SCQF Level 6

Who is this SVQ for?

The Levels 2 SVQ in Customer Service

The Level 2 SVQ is designed for staff who are responsible for delivering customer service and who interact directly with the customer, for example sales or retail staff, staff working on service desks, call centre staff.

What progression does this SVQ offer?

Level 2 candidates could progress within their work place as customer service front line staff. They could also progress to other Level 2 vocational qualifications such as the:

- Level 2 SVQ in Business Administration
- Level 2 SVQ in Team Leading
- Edexcel Level 2 NVQ in Business Administration
- Edexcel Level 2 NVQ Certificate in Customer Service
- Edexcel Level 2 BTEC Award/Certificate in Customer Service
- Edexcel Level 2 BTEC Award / Certificate in Principles of Business Administration
- Edexcel Level 2 BTEC Award/Certificate/Diploma in Business Administration
- Edexcel Level 2 BTEC Award/Certificate/Extended Certificate in Business (Specialist)
- Edexcel Level 2 BTEC Award in Introducing Team Leading
- Edexcel Level 2 BTEC Award/Certificate in Team Leading

or they could progress to Level 3 vocational qualifications such as the:

- Level 3 SVQ in Customer Service
- Level 3 SVQ in Business and Administration
- Level 3 SVQ in Management
- Edexcel Level 3 NVQ in Business Administration
- Edexcel Level 3 NVQ Certificate in Customer Service
- Edexcel Level 3 BTEC Award/Certificate in Customer Service
- Edexcel Level 3 BTEC Award/Certificate in Principles of Business Administration
- Edexcel Level 3 BTEC Award/Certificate/Diploma in Business Administration
- Edexcel Level 3 BTEC Certificate/Diploma in Business (Specialist)
- Edexcel Level 3 BTEC Award in Introducing Management
- Edexcel Level 3 BTEC Award/Certificate in Management
- Edexcel Level 3 BTEC National Award/Diploma in Business.
- Edexcel Level 3 Certificate in Management

Themes

In the Edexcel SVQ2 in Customer Service at SCQF Level 5, the option units are categorised by themes that reflect different aspects of customer service. At each level, at least one option unit should be taken from each theme to ensure coverage of the different aspects of customer service. Candidates will therefore include these different areas within their work roles. The remaining option units can be taken from any theme.

The themes are:

Foundations: this theme relates to the core units and covers the principles of customer service and organisational rules affecting customer service. It includes the knowledge of the organisation's products and services, and organisational procedures for dealing with customers.

Impression and image: this theme focuses on the impression made by the individual delivering customer service and by the organisation. It includes building a rapport with the customer, dealing with customers in different ways (face to face, in writing or using ICT), living up to the customer service promise and using customer information to exceed customer expectations.

Delivery: this theme focuses on delivering customer service and building relationships with the customer. It includes issues such as providing a consistent, reliable service, diversity, and working with others (such as service partnerships) to provide customer service.

Handling problems: this theme looks at recognising and resolving customer queries and problems, monitoring customer service problems and handling customer complaints.

Development and improvement: this theme looks at monitoring and improving customer service by developing customer relationships and leading, supporting and working with others to implement improvements. It also covers the analysis of customer feedback and the development of customer service strategy, as well as personal development.

What is the structure of the SVQ2 in Customer Service in SCQF Level 5?

To achieve the whole qualification at Level 5, you must prove competence in **two mandatory units** and **five option units**. At least one option unit should be taken from each theme.

Mandatory units for the SVQ2 in Customer Service at SCQF Level 5

You must achieve **both** of the units listed below:

Unit number	SCQF level	Title	Element number	Title
F1	4	Communicate using customer service language	F1.1	Identify customers and their characteristics and expectations
			F1.2	Identify your organisation's services and products
F2	5	Follow the rules to deliver customer service	F2.1	Follow your organisation's customer service practices and procedures
			F2.2	Follow legislation and external regulation that relate to customer service

Option units for the SVQ2 in Customer Service at SCQF Level 5

You must achieve five of the units listed below. At least one option unit should be taken from each theme.

Unit number	SCQF level	Title	Element number	Title
Theme: Impression and image				
A3	5	Communicate effectively with customers	A3.1	Communicate effectively with customers
A4	5	Give customers a positive impression of yourself and your organisation	A4.1	Establish rapport with customers
			A4.2	Respond appropriately to customers
			A4.3	Communicate information to customers
A5	5	Promote additional services or products to customers	A5.1	Identify additional services or products that are available
			A5.2	Inform customers about additional services or products
			A5.3	Gain customer commitment to using additional services or products
A6	5	Process information about customers	A6.1	Collect information about customers
			A6.2	Select and retrieve information about customers
			A6.3	Supply information about customers
A7	5	Live up to the customer service promise	A7.1	Understand and explain the customer service promise
			A7.2	Produce customer satisfaction by delivering the customer service promise

Unit number	SCQF level	Title	Element number	Title
A8	5	Make customer service personal	A8.1	Identify opportunities for making customer service personal
			A8.2	Treat your customer as an individual
A9	5	Go the extra mile in customer service	A9.1	Distinguish between routine service standards and going the extra mile
			A9.2	Check that your extra mile ideas are feasible
			A9.3	Go the extra mile
A10	5	Deal with customers face to face	A10.1	Communicate effectively with your customer
			A10.2	Improve the rapport with your customer through body language
A11	5	Deal with incoming telephone calls from customers	A11.1	Use communication systems effectively
			A11.2	Establish rapport with customers who are calling
			A11.3	Deal effectively with customer questions and requests
A12	5	Make telephone calls to customers	A12.1	Plan your calls effectively
			A12.2	Use communication systems effectively
			A12.3	Make focussed calls to your customer

Unit number	SCQF level	Title	Element number	Title
Theme: Delivery				
B2	5	Deliver reliable customer service	B2.1	Prepare to deal with your customers
			B2.2	Give consistent service to customers
			B2.3	Check customer service delivery
B3	5	Deliver customer service on your customer's premises	B3.1	Establish a rapport with your customer
			B3.2	Combine customer service with your other skills and expertise
B4	5	Recognise diversity when delivering customer service	B4.1	Respect customers as individuals and promote equality in customer service
			B4.2	Adapt customer service to recognise the different needs and expectations of diverse groups of customers
B5	5	Deal with customers across a language divide	B5.1	Prepare to deal with customers with a different first language
			B5.2	Deal with customers who speak a different first language from your own
B6	5	Use questioning techniques when delivering customer service	B6.1	Establish rapport and identify customer concerns
			B6.2	Seek detailed information from customers using questioning techniques
B7	5	Deal with customers using bespoke software	B7.1	Prepare to deliver customer service using bespoke software
			B7.2	Deliver customer service using bespoke software

Unit number	SCQF level	Title	Element number	Title
B8	5	Maintain customer service through effective hand over	B8.1	Agree joint responsibilities in a customer service team
			B8.2	Check that customer service actions are seen through by working together with colleagues

Unit number	SCQF level	Title	Element number	Title
Theme: Handling problems				
C3	5	Resolve customer service problems	C3.1	Spot customer service problems
			C3.2	Pick the best solution to resolve customer service problems
			C3.3	Take action to resolve customer service problems
C4	5	Deliver customer service to difficult customers	C4.1	Recognise when customers may be difficult to deal with
			C4.2	Deal with difficult customers
C5	6	Monitor and solve customer service problems	C5.1	Solve immediate customer service problems
			C5.2	Identify repeated customer service problems and options for solving them
			C5.3	Take action to avoid the repetition of customer service problems
C6	7	Apply risk assessment to customer service	C6.1	Analyse customer service processes for risk
			C6.2	Assess customer service risks and take appropriate actions
C7	7	Process customer service complaints	C7.1	Recognise the signs that a query or problem is about to produce a complaint
			C7.2	Deal with a complaint effectively

Unit number	SCQF level	Title	Element number	Title
Theme: Development and improvement				
D1	5	Develop customer relationships	D1.1	Build your customer's confidence that the service you give will be excellent
			D1.2	Meet the expectations of your customers
			D1.3	Develop the long-term relationship between your customer and your organisation
D2	5	Support customer service improvements	D2.1	Use feedback to identify potential customer service improvements
			D2.2	Implement changes in customer service
			D2.3	Assist with the evaluation of changes in customer service
D3	5	Develop personal performance through delivering customer service	D3.1	Review performance in your customer service role
			D3.2	Prepare a personal development plan and keep it up to date
			D3.3	Undertake development activities and obtain feedback on your customer service performance
D4	5	Support customers using on-line customer services	D4.1	Establish the type and level of support your customer needs to achieve on-line customer service
			D4.2	Support on-line customer service in conversation with your customer
D5	5	Buddy a colleague to develop their customer service skills	D5.1	Plan and prepare to buddy a colleague
			D5.2	Support your buddy colleague on the job
			D5.3	Provide buddy support off the job

Unit number	SCQF level	Title	Element number	Title
D6	5	Develop your own customer service skills through self-study	D6.1	Find ways to learn more about customer service and your job
			D6.2	Use sources of self-development to extend your customer service skills and knowledge
D7	5	Support customers using self-service technology	D7.1	Identify the type of help needed by a customer using self-service technology
			D7.2	Assist a customer using self-service technology

Section 2: Worked examples of forms

This section should be read alongside the *SVQ guidance for candidates*, which you should get from your assessor. This publication provides a full explanation about:

- SVQ qualifications and how they are assessed
- what evidence is and how you can collect it
- how to build your portfolio logbook
- how to use each recording form.

This is also available on the Edexcel website at:

<http://pearsonwbl.edexcel.com/quals/scotland/Pages/default.aspx>

Collecting your evidence

This section contains completed examples of the forms you, your assessor and the internal verifier will use while you are undertaking your Level 2 SVQ in Customer Service.

The forms are:

- Form 1: Portfolio title page
- Form 2: Personal profile
- Form 3: Contents checklist
- Form 4: Index of evidence
- Form 5: Unit assessment plan
- Form 6: Unit progress and sign-off record
- Form 7: Element achievement record
- Form 8: Knowledge evidence record
- Form 9: Personal statement
- Form 10: Observation record
- Form 11: Witness testimony
- Form 12: Expert witness evidence record
- Form 13: Record of questions and candidate's answers.

You will find a detailed description on how to use these forms in the *SVQ guidance for candidates*.

You should ask your assessor for further advice and support if you are still unsure about how to use the forms and who should complete them.

The evidence requirements are included after the introduction to each unit. Assessors must decide which evidence the candidate will produce and note this on the element achievement record under 'Evidence Requirements'.

Example form 1 – Portfolio title page

NAME: Annie Clews	
JOB TITLE: Customer Service Assistant	
NAME OF EMPLOYER/TRAINING PROVIDER/COLLEGE: Seaworld Leisure Park	
THEIR ADDRESS: 15 The Esplanade Oldtown Seashire POSTCODE: SH12 4BW	
TELEPHONE NUMBER (HOME): 01265 458319	(WORK): 01265 466700
EMAIL ADDRESS: a.clews6@aol.com	FAX NUMBER: 01265 466701
SVQ: Customer Service SCQF LEVEL: 5	
UNITS SUBMITTED FOR ASSESSMENT: B2 - Deliver reliable customer service	
MENTOR: Clara Beddow (PLEASE PROVIDE DETAILS OF MENTOR'S EXPERIENCE): Customer service manager at Seaworld Leisure Park for six years.	
ASSESSOR: Jim Sullivan	DATE: 05/12/10

Example form 2 – Personal profile

NAME: Annie Clews	
ADDRESS: 47 Park Avenue Oldtown Seashire POSTCODE: SH11 6PA	
TELEPHONE NUMBER (HOME): 01265 458319	(WORK): 01265 466700
EMAIL ADDRESS: a.clews6@aol.com	FAX NUMBER: 01265 466701
JOB TITLE: Customer service assistant	
RELEVANT EXPERIENCE	
DESCRIPTION OF YOUR CURRENT JOB: I lead a small team of part-time staff who are responsible for the reception area and gift shop of the park. This includes daily admissions, handling enquiries and complaints, and ensuring adequate stock levels in the shop.	
PREVIOUS WORK EXPERIENCE OR ATTACH COPY OF A CURRENT CV: 1 year - part-time cashier (supermarket) 2 years - part-time waitress	
QUALIFICATIONS AND TRAINING AND/OR ATTACH COPY OF A CURRENT CV: 8 Standard Grades BTEC First Diploma in Business In-company training on health and safety	

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VOLUNTARY WORK/INTERESTS:

I am a black belt in Taekwondo and help at lessons with young children. I also enjoy horseriding and hockey.

NAME OF EMPLOYER/TRAINING PROVIDER/COLLEGE:

Seaworld Leisure Park

ADDRESS:

Oldtown Country Park
Oldtown
Seashire

POSTCODE: SH12 4BW

TELEPHONE NUMBER (WORK): 01265 466700

FAX NUMBER: 01265 466701

EMAIL ADDRESS: a.clews6@aol.com

TYPE OF BUSINESS, IF EMPLOYER: Leisure park specialising in conservation for sea life and breeding programmes

NUMBER OF STAFF: 28 (permanent); 30 additional temporary staff during the summer season

STRUCTURE OF ORGANISATION (INCLUDING CHART OR DIAGRAM IF AVAILABLE):

head office
general manager
marketing manager/operations manager/customer service manager
six supervisors
staff

Example form 3 – Contents checklist

SVQ title: SVQ2 in Customer Service at SCQF level 5		
Candidate: Annie Clews		
	Completed?	Page/section number
Title page for the portfolio	✓	1
Personal profile <ul style="list-style-type: none"> • your own personal details • a brief CV or career profile • description of your job • information about your employer/training provider/college 	✓ ✓ ✓ ✓	2 3 3 3
Summary of the units	✓	1
Completed units <ul style="list-style-type: none"> • signed by yourself, your assessor and the internal verifier (where relevant) • reference numbers included • unit assessment plans 	✓ ✓ ✓	4 4 4
Unit progress records	✓	5
Index of evidence (with cross-referencing information completed)	✓	6
Evidence (with reference numbers) <ul style="list-style-type: none"> • observation records • details of witnesses (witness testimony sheets) • personal statements 	✓ ✓ ✓	6 6 6

Example form 4 – Index of evidence

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Evidence number	Description of evidence	Included in portfolio (Yes/No) <i>If No, state location</i>	Units/elements evidence links to <i>(give specific numbers, eg 5.2.1)</i>	Internal verifier signature and date of sampling
1	Personal statement	Yes	F2.1.1, F2.1.2, F2.1.3	M A Kail 27.05.11
2	Witness testimonial	Yes	F2.1.2, F2.1.3, F2.2.2	M A Kail 27.05.11
3	Observation records	Yes	F2.1.3, F2.2.3	M A Kail 27.05.11
4	Performance review 2010	Yes	F2.2.1, F2.2.2,	M A Kail 27.05.11
5	Personal statement	Yes	F2.2.1, F2.2.2, F2.2.3	M A Kail 27.05.11
6	In house training records	Yes	F2.1 (all), F2.2 (all)	M A Kail 27.05.11
7	Thank you letter from customer	Yes	F2.2.2	M A Kail 27.05.11
8	Copy of organisation's induction handbook	No (in office)	F2.1 (all), F2.2 (all)	M A Kail 27.05.11
9	Witness testimonial	Yes	F2.1.3	M A Kail 27.05.11

Example form 5 – Unit assessment plan

SVQ title: SVQ2 in Customer Service at SCQF level 5				
Unit: F2 Follow the rules to deliver customer service				
Candidate: Annie Clews			Assessor: Jim Sullivan	
Normal working activities performed				
	Typical evidence	Work area	Expected completion date	Links to other units/elements
ELEMENT: F2.1 Follow your organisation's customer service practices and procedures				
Attend in-house induction training	Induction handbook including health and safety, personal statement, performance review, witness testimony from supervisor. Company handouts on procedures for delivering customer service and emergency procedures.	Reception, gift shop	01.05.11	
ELEMENT: F2.2 Follow legislation and external regulation that relate to customer service				
Attend in-house induction training Attend weekly team meetings Answer customer questions	Induction handbook including health and safety, personal statement, performance review, witness testimony from supervisor. Diary notes of team meetings. Witness testimony from supervisor and colleagues. Customer feedback.	Reception, gift shop	30.05.11	

continued overleaf...

Activities needing to be performed				
ELEMENT: F2.1 Follow your organisation's customer service practices and procedures				
Complete induction training Examine company procedures	Signed off induction handbook Performance review documents		27.05.11	
ELEMENT: F2.2 Follow legislation and external regulation that relate to customer service				
	Personal statement covering knowledge and understanding.		27.05.11	
Additional comments Most of the evidence for this unit will be gathered through the completion of the organisation's induction programme and customer feedback.				
Assessor's signature: Annie Clews			Date: 03.06.11	
Candidate's signature: Jim Sullivan			Date: 03.06.11	

Example form 6 – Unit progress and sign-off record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5									
Candidate: Annie Clews									
Assessor: Jim Sullivan									
To achieve the whole qualification, you must prove competence in two mandatory units and five option units. Unit checklist: list here the units you will be undertaking, then circle the reference number of each unit as you complete it.									
Mandatory	F2	F1							
Option	A10	B2	C3	D2	D3				

Mandatory units			
Unit number	Title	Assessor's signature	Date
F1	Prepare yourself to deliver good customer service		
F2	Follow the rules to deliver customer service	J Sullivan	03.06.11
Option units			
Unit number	Title	Assessor's signature	Date
A10	Deal with customers face to face	J Sullivan	24.06.11
B2	Deliver reliable customer service	J Sullivan	29.07.11
C3	Resolve customer service problems	J Sullivan	29.07.11
D2	Support customer service improvements		
D3	Develop personal performance through delivering customer service		

Example form 7 – Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate: Annie Clews				
Assessor: Jim Sullivan				
Unit title: F2 Follow the rules to deliver customer service				
Element: F2.1 Follow your organisation's customer service practices and procedures				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
F2.1.1	follow organisational practices and procedures that relate to your customer service work	17.05.11	15.06.11	08.07.11
F2.1.2	recognise the limits of what you are allowed to do when delivering customer service	17.05.11	15.06.11	
F2.1.3	refer to somebody in authority when you need to	17.05.11	08.07.11	
F2.1.4	work in a way that protects the security of customers and their property	17.05.11	15.06.11	08.07.11
F2.1.5	work in a way that protects the security of information about customers			
Evidence requirements: You must provide evidence of being willing and helpful with customers:				
a	during routine delivery of customer service	17.05.11	15.06.11	
b	during a busy period for your organisation	04.07.11	08.07.11	
c	during a quiet period for your organisation	14.05.11	17.09.11	
d	when people, systems or resources have let you down.	17.05.11	08.07.11	

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Feedback/comments:

The evidence you have produced for this unit fully meets the assessment requirements. You have provided a range of documents and work products which support your knowledge and understanding of the organisational rules and external legislation which affect customer service provision.

Well done.

Assessor's signature: J Sullivan

Date: 27.09.11

Candidate's signature: Annie Clews

Date: 27.09.11

Example form 8 – Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5									
Candidate: Annie Clews					Assessor: Jim Sullivan				
<p>Unit title: F2 Follow the rules to deliver customer service</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	W T	S	APEL	Q&A Date	EWE	PD
f2a) organisational practices and procedures that relate to your customer service work	1 10		✓						✓
f2b) the limits of what you are allowed to do when delivering customer service	2			✓			✓		
f2c) when and how you should refer to somebody in authority about the rules for delivering customer service	2			✓					
f2d) how you protect the security of customers and their property	5		✓				✓		
f2e) how you protect the security of information about customers	2								
f2f) your health and safety responsibilities as they relate to your customer service work	1 10		✓						✓

continued overleaf...

f2g)	your responsibilities to deliver customer service treating customers equally	3 5		✓				✓	✓	
f2h)	why it is important to respect customer and organisation confidentiality	5		✓						
f2i)	the main things you must do and not do in your job under legislation that affects your customer service work	8		✓				✓		
f2j)	the main things that you must do and not do in your job under external regulations that affect your customer service work	9		✓				✓		

Feedback/comments:

From your evidence and our professional discussion it is evident that you have a sound knowledge and understanding of the importance of following organisational procedures. The expert witness testimonial on external legislation confirms this.

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature: Annie Clews

Date: 27.05.11

Assessor's signature: Jim Sullivan

Date: 27.05.11

Internal verifier's signature: Mary Ann Kail

Date: 24.06.11

continued overleaf...

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Example form 9 – Personal statement

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Unit: F2 Follow the rules to deliver customer service				
Candidate: Annie Clews				
Purpose of statement:				
Evidence index number: 1				
Date	Evidence index number	Details of statement	Links to other evidence (enter numbers)	Units, elements and PCs covered
13.05.11	1	<p>To support my work towards Unit F2 I have completed Seaworld's six month induction programme. This is very comprehensive and has allowed me to cover everything from company policies and procedures, to health and safety, and all aspects of customer service. I was allocated a 'buddy' to guide and monitor my progress, and this has enabled me to check my understanding of anything I was unsure about. For example, I needed to confirm at what point I should refer a complaint to my manager.</p> <p>I found that the induction process has given me the confidence to provide customer service within the organisation's rules and regulations. During peak season the reception area and the gift shop are very busy, and I have developed an awareness of the security measures in place to protect customers and their property. In order to attract visitors to the park, the company uses a range of marketing activities, and this unit has helped me develop an awareness of the importance for both colleagues and customers of keeping myself up to date with this information so that I can answer customer questions confidently.</p>		F2a knowledge

continued overleaf...

Date	Evidence index number	Details of statement	Links to other evidence (enter numbers)	Units, elements and PCs covered
		The induction programme was used as evidence at my performance review meeting with my manager. A copy of a witness testimonial from my 'buddy' and an observation report from my assessor confirm how I followed organisational procedures.		
Candidate's signature: Annie Clews			Date: 14.05.11	
Assessor's signature: Jim Sullivan			Date: 30.05.11	

Example form 10 – Observation record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5	
Unit/element(s): F2.1 Follow your organisation's customer service practices and procedures	
Candidate: Annie Clews	Date of observation: 14.05.11
Evidence index number: 3	
Skills/activities observed:	PCs and range covered:
Annie had a long queue of visitors waiting to enter the park, the temporary staff member was off sick, and her other team member had been called to help in the shop. One customer paid with a credit card that was rejected, and didn't have other means of payment. The customer was getting upset and had three young children who were getting restless. Annie asked the customer to wait in the office, and then paged her manager to help sort out the customer's problem, so that she could deal with the queue.	F2.1.1; F2.1.2; F2.1.3
Knowledge and understanding apparent from this observation:	
F2a; F2b; F2g	
Other units/elements to which this evidence may contribute:	
A10 Deal with customers face to face C3 Resolve customer service problems	
Assessor comments and feedback to candidate:	
You were clearly following organisational procedures, and recognised the limits of your responsibilities by referring on the credit card problem. You saved the customer the embarrassment of having to have her problem dealt with in public. It was a hot day and customers with young children had been waiting for some time, which could have caused a health and safety issue.	
I can confirm the candidate's performance was satisfactory.	
Assessor's signature: Jim Sullivan	Date: 04.06.11
Candidate's signature: Annie Clews	Date: 04.06.11

Example form 11 – Witness testimony

SVQ title and level: SVQ2 in Customer Service at SCQF level 5	
Candidate name: Annie Clews	
Evidence index number: 2	
Where applicable, evidence number to which this testimony relates:	
Unit: F2 Follow the rules to deliver customer service	
Element(s): F2.1 Follow your organisation’s customer service practices and procedures	
Date of evidence: 09.05.11	
Witness name: Clara Beddow	
Relationship to candidate: Manager	
<p>Details of testimony:</p> <p>Annie has nearly completed the company’s intensive induction programme, and is fully aware of the organisational procedures for delivering customer service.</p> <p>On 09 May Annie was on reception duty. However, due to staff shortages that day, Annie was ‘holding the fort’, and it was an exceptionally busy day.</p> <p>Annie referred to me an issue with an upset customer whose credit card was rejected. I confirm this is the correct procedure for Annie to follow, and she handled the situation well. The customer said to me that she was pleased that Annie put her in a separate office, as that situation could be very embarrassing in public.</p>	
I can confirm the candidate’s evidence is authentic and accurate.	
Witness signature: Clara Beddow	
Name: Clara Beddow	Date: 10.05.11
Contact telephone number: 01265 466700 (extension 235)	
<i>Please tick (✓) the appropriate box.</i>	
<input checked="" type="checkbox"/>	QUALIFIED AS AN ASSESSOR FOR WORKPLACE PERFORMANCE
<input checked="" type="checkbox"/>	FAMILIAR WITH THE SVQ STANDARDS TO WHICH THE CANDIDATE IS WORKING

Example form 12 – Expert witness evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5	
Candidate name: Annie Clews	
Evidence index number: 9	
Where applicable, evidence number to which this testimony relates:	
Unit: F2 Follow the rules to deliver customer service	
Element(s): F2.1 Follow your organisation's customer service practices and procedures	
Date of evidence: 24.05.11	
Expert witness name: Charles Stephens	
Relationship to candidate: Company health and safety officer	
Details of testimony: <p>I carried out a scheduled health and safety inspection of Oldtown's Seaworld Leisure Park on 24.05.11, which included the area Annie works in. I confirm that the reception area and gift shop met all the health and safety requirements, and from my discussions with Annie she was keen to demonstrate her awareness and knowledge of this. Annie has a good working knowledge and understanding of health, safety and security issues, meeting the above standards and related knowledge.</p>	
I can confirm the candidate's evidence is authentic and accurate.	
Expert witness signature: Charles Stephens	
Name: Charles Stephens	Date: 24.05.11
Contact telephone number: 01379 326900	
<i>Please tick (✓) the appropriate box.</i>	
<input checked="" type="checkbox"/>	QUALIFIED AS AN ASSESSOR FOR WORKPLACE PERFORMANCE
<input checked="" type="checkbox"/>	RELEVANT PROFESSIONAL WORK ROLE THAT INVOLVES EVALUATING EVERYDAY STAFF PRACTICE
<input checked="" type="checkbox"/>	CURRENT EXPERTISE
<input checked="" type="checkbox"/>	FAMILIAR WITH THE SVQ STANDARDS TO WHICH THE CANDIDATE IS WORKING

Example form 13 – Record of questions and candidate’s answers

SVQ title and level: Edexcel SVQ2 in Customer Service at SCQF level 5	
Candidate name: Annie Clews	
Unit: F2 Follow the rules to deliver customer service	Element(s): F2.1 Follow your organisation’s customer service practices and procedures
Evidence index number: 5	
Circumstances of assessment: Knowledge is inferred from performance across the whole element. To conclude the knowledge and understanding requirements, I asked the candidate a number of questions indicated below:	
List of questions and candidate’s responses:	
Q: Give some examples of what ‘providing good customer service’ means to you.	
A: Good customer service is about ensuring that the total experience the customer receives is a positive one through giving prompt and courteous attention. This means that customers enjoy the facilities the park has to offer, and want to come again, as well as recommending us to their friends and families. We do provide discounts for further visits and have introduced an annual pass giving excellent value for money. Good customer service also means handling complaints so the customer is satisfied. If a visitor receives poor customer service then the reputation of the park will suffer and potential customers may be put off, in addition to staff morale being lowered.	
Q: How could you explain to a customer that you cannot help them?	
A: I would be courteous and explain why I couldn’t help them, but advise them who would. I would try and take the customer away from the immediate area to save their embarrassment, especially if there are payment issues. This would not allow other customers to hear what was going on, as they may react or be upset by this.	
Assessor’s signature: Jim Sullivan	Date: 27.05.11
Candidate’s signature: Annie Clews	Date: 27.05.11

Section 3: Logbook

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Mandatory units

Evidence requirements

- 1 Wherever possible your 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 You 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 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You must provide evidence of being willing and helpful with customers:
 - a during routine delivery of customer service
 - b during a busy period for your organisation
 - c during a quiet period for your organisation
 - d when people, systems or resources have let you down.
- 5 Your evidence must show that:
 - a you have worked within your own limits of authority
 - b you have referred to somebody in authority when you have needed to.
- 6 Your evidence must also include examples of rules that are based on:
 - a legislation
 - b sector or industry regulation
 - c your organisation's policies.
- 7 Records of your evidence may be kept using any combination of methods such as documents, audio or video recording, notes of a conversation with your assessor, manager or mentor, witness testimonies or any other method that makes your assessor confident that you have proved competence.

Unit summary sheet

Unit F1: Communicate using customer service language

This Unit is part of the Customer Service Theme of Customer Service Foundations. This Theme covers the language and concepts of Customer Service as well as the organisational context and the external environment in which you work. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

You need to be able to communicate with customers and colleagues using language and concepts that they can understand. This unit is about the language and basic principles that are the heart of customer service and the skills you need to communicate effectively with customers and colleagues. It also covers how you fit into the customer service picture in your organisation and the contribution of your job to good customer service. You need to be able to describe and explain the services or products that your organisation offers and how it delivers customer service. This means that you need to use the right language to describe customer service and describe why an organisation needs to balance customer needs with what the organisation is willing and able to provide. Using that language, the unit will help you to understand how you and your job fit in. Everybody involved in customer service needs to know the customer service content of their job.

Customer Service Standards

When you communicate using customer service language you are able to:

F1.1 Identify customers and their characteristics and expectations

- f1.1.1 recognise typical customers and their expectations
- f1.1.2 discuss customer expectations with colleagues using recognised customer service language
- f1.1.3 follow procedures through which you and your colleagues deliver effective customer service

F1.2 Identify your organisation's services and products

- f1.2.1 outline your organisation's services and products to customers
- f1.2.2 list the information you need to deliver effective customer service and where that information can be found
- f1.2.3 discuss with colleagues the part you play in delivering your organisation's service offer

Knowledge and understanding

To be competent at communicating using customer service language you must know and understand:

- f1a) the differences between an internal customer and an external customer
- f1b) your organisation's services or products
- f1c) the connection between customer expectations and customer satisfaction in customer service
- f1d) why good customer service is important to any organisation

- f1e) why organisation procedures are important to good customer service
- f1f) why teamwork is central to good customer service
- f1g) the service offer of your organisation
- f1h) the part you play in delivering customer service
- f1i) who are your customers
- f1j) the main characteristics of typical customers that you deal with
- f1k) what impresses your customers and what annoys your customers
- f1l) who's who and who does what to deliver customer service in your organisation
- f1m) the kinds of information you need to give good service to customers
- f1n) how to find information about your organisation's services or products
- f1o) typical customer service problems in your work and who should be told about them
- f1p) how the way you behave affects your customer's service experience

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: F1 Communicate using customer service language				
Element: F1.1 Identify customers and their characteristics and expectations				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
F1.1.1	recognise typical customers and their expectations			
F1.1.2	discuss customer expectations with colleagues using recognised customer service language			
F1.1.3	follow procedures through which you and your colleagues deliver effective customer service			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: F1 Communicate using customer service language				
Element: F1.2 Identify your organisation's services and products				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
F1.2.1	outline your organisation's services and products to customers			
F1.2.2	list the information you need to deliver effective customer service and where that information can be found			
F1.2.3	discuss with colleagues the part you play in delivering your organisation's service offer			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit F1: Communicate using customer service language</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
F1a)	the differences between an internal customer and an external customer									
F1b)	your organisation's services or products									
F1c)	the connection between customer expectations and customer satisfaction in customer service									
F1d)	why good customer service is important to any organisation									
F1e)	why organisation procedures are important to good customer service									
F1f)	why teamwork is central to good customer service									
F1g)	the service offer of your organisation									
F1h)	the part you play in delivering customer service									
F1i)	who are your customers									

continued overleaf...

Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
F1j) the main characteristics of typical customers that you deal with									
F1k) what impresses your customers and what annoys your customers									
F1l) who's who and who does what to deliver customer service in your organisation									
F1m) the kinds of information you need to give good service to customers									
F1n) how to find information about your organisation's services or products									
F1o) typical customer service problems in your work and who should be told about them									
F1p) how the way you behave affects your customer's service experience									

continued overleaf...

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit F2: Follow the rules to deliver customer service

This Unit is part of the Customer Service Theme of Customer Service Foundations. This Theme covers the language and concepts of Customer Service as well as the organisational context and the external environment in which you work. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

There are rules set by organisations about what you can and cannot do for customers. Some of those rules are the result of general responsibilities set by legislation and apply to everybody. Other rules are specific to an industry so are followed by your organisation because of the business you are in. Some rules are set by your organisation alone because of the particular way it wants its customer service to be delivered. This unit requires you to show that you know and understand the all rules that apply to customer service delivered by your organisation and how they apply to you and your job.

Customer Service Standards

When you follow the rules to deliver customer service within the rules you are able to:

F2.1 Follow your organisation's customer service practices and procedures

- f2.1.1 follow organisational practices and procedures that relate to your customer service work
- f2.1.2 recognise the limits of what you are allowed to do when delivering customer service
- f2.1.3 refer to somebody in authority when you need to
- f2.1.4 work in a way that protects the security of customers and their property
- f2.1.5 work in a way that protects the security of information about customers

F2.2 Follow legislation and external regulation that relate to customer service

- f2.2.1 work in a way that is safe for your customers and your colleagues
- f2.2.2 treat customers equally
- f2.2.3 respect confidentiality relating to customers and the organisation
- f2.2.4 work in a way that shows you are aware of the areas of your job that are covered by legislation and the things you must not do
- f2.2.5 work in a way that shows you are aware of the main external regulations that apply to your job and the things you must not

Knowledge and understanding

To be competent at following the rules to deliver customer service you must know and understand:

- f2a) organisational practices and procedures that relate to your customer service work
- f2b) the limits of what you are allowed to do when delivering customer service
- f2c) when and how you should refer to somebody in authority about the rules for delivering customer service
- f2d) how you protect the security of customers and their property
- f2e) how you protect the security of information about customers
- f2f) your health and safety responsibilities as they relate to your customer service work
- f2g) your responsibilities to deliver customer service treating customers equally
- f2h) why it is important to respect customer and organisation confidentiality
- f2i) the main things you must do and not do in your job under legislation that affects your customer service work
- f2j) the main things that you must do and not do in your job under external regulations that affect your customer service work

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: F2 Follow the rules to deliver customer service				
Element: F2.1 Follow your organisation's customer service practices and procedures				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
F2.1.1	follow organisational procedures and instructions in a willing and helpful way			
F2.1.2	recognise the limits of what you are allowed to do			
F2.1.3	refer to somebody in authority when you need to			
F2.1.4	work in a way that protects the security of customers and their property			
F2.1.5	work in a way that protects the security of information about customers			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: F2 Follow the rules to deliver customer service				
Element: F2.2 Follow legislation and external regulation that relate to customer service				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
F2.2.1	work in a way that is safe for your customers and your colleagues			
F2.2.2	treat customers equally			
F2.2.3	respect confidentiality relating to customers and the organisation			
F2.2.4	work in a way that shows you are aware of the areas of your job that are covered by legislation and the things you must not do			
F2.2.5	work in a way that shows you are aware of the main external regulations that apply to your job and the things you must not			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit F2: Follow the rules to deliver customer service</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
F2a)	organisational practices and procedures that relate to your customer service work									
F2b)	the limits of what you are allowed to do when delivering customer service									
F2c)	when and how you should refer to somebody in authority about the rules for delivering customer service									
F2d)	how you protect the security of customers and their property									
F2e)	how you protect the security of information about customers									
F2f)	your health and safety responsibilities as they relate to your customer service work									
F2g)	your responsibilities to deliver customer service treating customers equally									

continued overleaf...

Knowledge and understanding for this unit:	Type of evidence									
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD	
F2h) why it is important to respect customer and organisation confidentiality										
F2i) the main things you must do and not do in your job under legislation that affects your customer service work										
F2j) the main things that you must do and not do in your job under external regulations that affect your customer service work										

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Option units

Unit summary sheet

Unit A3: Communicate effectively with customers

This unit is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

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

Customer Service Standards

When you communicate effectively with customers you must consistently

a3.1 Communicate effectively with customers

- a3.1.1 listen actively to what customers are saying
- a3.1.2 identify the most important things that customers are telling you
- a3.1.3 respond appropriately to what customers are telling you
- a3.1.4 check that you understand what customers are telling you and make sure it is really what they mean
- a3.1.5 summarise information for customers
- a3.1.6 explain in a way that is clear and does not cause offence when you cannot help a customer
- a3.1.7 use appropriate body language when communicating with customers
- a3.1.8 read your customers' body language to help you understand their feelings and wishes
- a3.1.9 deal with customers in a respectful, helpful and professional way at all times
- a3.1.10 help to give good customer service by passing messages to colleagues

Knowledge and understanding

To be competent at communicating effectively with customers you must know and understand:

- a3a) the difference between hearing and listening
- a3b) how to listen actively
- a3c) how to read both positive and negative body language
- a3d) how to use body language effectively
- a3e) how to use questions to check that you understand what customers are telling you
- a3f) the difference between negative and positive language
- a3g) how to summarise

- a3h) why it is important to speak clearly
- a3i) why it is important to use words your customer will understand
- a3j) how to communicate with customers who have language, dialect or accents that are different from yours
- a3k) why the way you say things and your tone of voice affect the way your customer experiences your customer service
- a3l) what information is helpful to pass on in messages to colleagues so that customers receive good service

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A3 Communicate effectively with customers				
Element: A3.1 Communicate effectively with customers				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
A3.1.1	listen actively to what customers are saying			
A3.1.2	identify the most important things that customers are telling you			
A3.1.3	respond appropriately to what customers are telling you			
A3.1.4	check that you understand what customers are telling you and make sure it is really what they mean			
A3.1.5	summarise information for customers			
A3.1.6	explain in a way that is clear and does not cause offence when you cannot help a customer			
A3.1.7	use appropriate body language when communicating with customers			
A3.1.8	read your customers' body language to help you understand their feelings and wishes			
A3.1.9	deal with customers in a respectful, helpful and professional way at all times			
A3.1.10	help to give good customer service by passing messages to colleagues			

continued overleaf...

Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Knowledge evidence record

SVQ title: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit A3: Communicate effectively with customers</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
A3a)	the difference between hearing and listening									
A3b)	how to listen actively									
A3c)	how to read both positive and negative body language									
A3d)	how to use body language effectively									
A3e)	how to use questions to check that you understand what customers are telling you									
A3f)	the difference between negative and positive language									
A3g)	how to summarise									
A3h)	why it is important to speak clearly									
A3i)	why it is important to use words your customer will understand									

continued overleaf...

Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
A3j) how to communicate with customers who have language, dialect or accents that are different from yours									
A3k) why the way you say things and your tone of voice affect the way your customer experiences your customer service									
A3l) what information is helpful to pass on in messages to colleagues so that customers receive good service									

Feedback/comments:	
The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.	
Candidate's signature:	Date:
Assessor's signature:	Date:
Internal verifier's signature:	Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit A4: Give customers a positive impression of yourself and your organisation

This unit is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

Excellent customer service is provided by people who are good with people. Your behaviour affects the impression that customers have of the service they are receiving. This Unit is about communicating with your customers and giving a positive impression whenever you deal with a customer. By doing this you create a positive impression of your 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 your behaviour counts when dealing with a customer.

Customer Service Standards

When you give customers a positive impression of yourself and your organisation you must consistently:

A4.1 Establish rapport with customers

- a4.1.1 meet your organisation's standards of appearance and behaviour
- a4.1.2 greet your customer respectfully and in a friendly manner
- a4.1.3 communicate with your customer in a way that makes them feel valued and respected
- a4.1.4 identify and confirm your customer's expectations
- a4.1.5 treat your customer courteously and helpfully at all times
- a4.1.6 keep your customer informed and reassured
- a4.1.7 adapt your behaviour to respond to different customer behaviour

A4.2 Respond appropriately to customers

- a4.2.1 respond promptly to a customer seeking help
- a4.2.2 choose the most appropriate way to communicate with your customer
- a4.2.3 check with your customer that you have fully understood their expectations
- a4.2.4 respond promptly and positively to your customer's questions and comments
- a4.2.5 allow your customer time to consider your response and give further explanation when appropriate

A4.3 Communicate information to customers

- a4.3.1 quickly find information that will help your customer
- a4.3.2 give your customer information they need about the services or products offered by your organisation

- a4.3.3 recognise information that your customer might find complicated and check whether they fully understand
- a4.3.4 explain clearly to your customers any reasons why their expectations cannot be met

Knowledge and understanding

To be competent at giving customers a positive impression of yourself and your organisation you must know and understand:

- a4a) your organisation's standards for appearance and behaviour
- a4b) your organisation's guidelines for how to recognise what your customers want and respond appropriately
- a4c) your organisation's rules and procedures regarding the methods of communication you use
- a4d) how to recognise when a customer is angry or confused
- a4e) your organisation's standards for timeliness in responding to customer questions and requests for information

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A4 Give customers a positive impression of yourself and your organisation				
Element: A4.1 Establish rapport with customers				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
A4.1.1	meet your organisation's standards of appearance and behaviour			
A4.1.2	greet your customer respectfully and in a friendly manner			
A4.1.3	communicate with your customer in a way that makes them feel valued and respected			
A4.1.4	identify and confirm your customer's expectations			
A4.1.5	treat your customer courteously and helpfully at all times			
A4.1.6	keep your customer informed and reassured			
A4.1.7	adapt your behaviour to respond to different customer behaviour			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A4 Give customers a positive impression of yourself and your organisation				
Element: A4.2 Respond appropriately to customers				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
A4.2.1	respond promptly to a customer seeking help			
A4.2.2	choose the most appropriate way to communicate with your customer			
A4.2.3	check with your customer that you have fully understood their expectations			
A4.2.4	respond promptly and positively to your customer's questions and comments			
A4.2.5	allow your customer time to consider your response and give further explanation when appropriate			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A4 Give customers a positive impression of yourself and your organisation				
Element: A4.3 Communicate information to customers				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
A4.3.1	quickly find information that will help your customer			
A4.3.2	give your customer information they need about the services or products offered by your organisation			
A4.3.3	recognise information that your customer might find complicated and check whether they fully understand			
A4.3.4	explain clearly to your customers any reasons why their expectations cannot be met			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit A4: Give customers a positive impression of yourself and your organisation</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
A4a)	your organisation's standards for appearance and behaviour									
A4b)	your organisation's guidelines for how to recognise what your customer wants and respond appropriately									
A4c)	your organisation's rules and procedures regarding the methods of communication you use									
A4d)	how to recognise when a customer is angry or confused									
A4e)	your organisation's standards for timeliness in responding to customer questions and requests for information.									

continued overleaf...

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

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Unit summary sheet

Unit A5: Promote additional services or products to customers

This unit is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

Services or products are continually changing in organisations to keep up with customers' expectations. By offering new or improved services or products your 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 your need to keep pace with new developments and to encourage your 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 your organisation. Because of this everybody offering services or products needs to play a part in making customers aware of what is available. You should not choose this unit if your role does not want you to suggest additional services or products to customers.

Customer Service Standards

When you promote additional services or products to customers you must consistently:

A5.1 Identify additional services or products that are available

- a5.1.1 update and develop your knowledge of your organisation's services or products
- a5.1.2 check with others when you are unsure about new service or product details
- a5.1.3 identify appropriate services or products that may interest your customer
- a5.1.4 spot opportunities for offering your customer additional services or products that will improve their customer experience

A5.2 Inform customers about additional services or products

- a5.2.1 choose the best time to inform your customer about additional services or products
- a5.2.2 choose the best method of communication to introduce your customer to additional services or products
- a5.2.3 give your customer accurate and sufficient information to enable them to make a decision about the additional services or products
- a5.2.4 give your customer time to ask questions about the additional services or products

A5.3 Gain customer commitment to using additional services or products

- a5.3.1 close the conversation if your customer shows no interest
- a5.3.2 give information to move the situation forward when your customer shows interest
- a5.3.3 secure customer agreement and check customer understanding of the delivery of the service or product
- a5.3.4 take action to ensure prompt delivery of the additional services or products to your customer
- a5.3.5 refer your customer to others or to alternative sources of information if the additional services or products are not your responsibility

Knowledge and understanding

To be competent at promoting additional services or products to customers you need to know and understand:

- a5a) your organisation's procedures and systems for encouraging the use of additional services or products
- a5b) how additional services or products will benefit your customers
- a5c) how your customer's use of additional services or products will benefit your organisation
- a5d) the main factors that influence customers to use your services or products
- a5e) how to introduce additional services or products to customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products
- a5f) how to give appropriate, balanced information to customers about services or products

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A5 Promote additional services or products to customers				
Element: A5.1 Identify additional services or products that are available				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
A5.1.1	update and develop your knowledge of your organisation's services or products			
A5.1.2	check with others when you are unsure of new service or product details			
A5.1.3	identify appropriate services or products that may interest your customer			
A5.1.4	spot opportunities for offering your customer additional services or products that will improve their customer experience.			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A5 Promote additional services or products to customers				
Element: A5.2 Inform customers about additional services or products				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
A5.2.1	choose the best time to inform your customer about additional services or products			
A5.2.2	choose the best method of communication to introduce your customer to additional services or products			
A5.2.3	give your customer accurate and sufficient information to enable them to make a decision about the additional services or products			
A5.2.4	give your customer time to ask questions about the additional services or products			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A5 Promote additional services or products to customers				
Element: A5.3 Gain customer commitment to using additional services or products				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
A5.3.1	close the conversation if your customer shows no interest			
A5.3.2	give information to move the situation forward when your customer shows interest			
A5.3.3	secure customer agreement and check customer understanding of the delivery of the service or product			
A5.3.4	take action to ensure prompt delivery of the additional services or products to your customer			
A5.3.5	refer your customer to others or to alternative sources of information if the additional services or products are not your responsibility			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit A5: Promote additional services or products to customers</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
A5a)	your organisation's procedures and systems for encouraging the use of additional services or products									
A5b)	how the use of additional services or products will benefit your customers									
A5c)	how your customer's use of additional services or products will benefit your organisation									
A5d)	the main factors that influence customers to use your services or products									
A5e)	how to introduce additional services or products to customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products									
A5f)	how to give appropriate, balanced information to customers about services or products.									

continued overleaf...

Feedback/comments:

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Date:

Assessor's signature:

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Internal verifier's signature:

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Unit summary sheet

Unit A6: Process information about customers

This unit is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

You and your organisation need information about your customers and their behaviour to answer customer questions and to respond to customer requests. Information about customers is also used by your organisation to develop its customer service. Some customer information is collected from your customers. Other customer information is collected through information systems and equipment that make records of service delivery. In either case you 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.

Customer service standards

When you process information about customers you must consistently:

A6.1 Collect information about customers

- a6.1.1 collect and record new information about customers following your organisation's guidelines
- a6.1.2 update existing information about customers
- a6.1.3 record and store information about customers that is accurate, sufficient and relevant following organisational guidelines

A6.2 Select and retrieve information about customers

- a6.2.1 respond promptly to authorised requests for information about customers
- a6.2.2 select and retrieve relevant information for customers or colleagues following your organisation's guidelines

A6.3 Supply information about customers

- a6.3.1 supply accurate and sufficient information about customers to meet your customers or colleagues' expectations
- a6.3.2 choose the most appropriate way to supply information to your customers or colleagues
- a6.3.3 confirm that your customers or colleagues have received and understood the customer information

Knowledge and understanding

To be competent at processing customer service information you need to know and understand:

- a6a) your organisation's procedures and guidelines for collecting, retrieving and supplying information about customers
- a6b) types of personal information about customers that should and should not be kept on record
- a6c) how to collect information about customers efficiently and effectively
- a6d) how to operate the customer information storage system
- a6e) why processing information about customers correctly makes an important contribution to effective customer service
- a6f) the importance of attention to detail when processing information about customers
- a6g) legal and regulatory restrictions on the storage and use of customer data

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A6 Process information about customers				
Element: A6.1 Collect information about customers				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
A6.1.1	collect and record new information about customers following your organisation's guidelines			
A6.1.2	update existing information about customers			
A6.1.3	record and store information about customers that is accurate, sufficient and relevant following organisational guidelines.			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A6 Process information about customers				
Element: A6.2 Select and retrieve information about customers				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
A6.2.1 respond promptly to authorised requests for information about customers				
A6.2.2 select and retrieve relevant information for customers or colleagues following your organisation's guidelines				

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A6 Process information about customers				
Element: A6.3 Supply information about customers				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
A6.3.1	supply accurate and sufficient information about customers to meet your customers or colleagues' expectations			
A6.3.2	choose the most appropriate way to supply information to your customers or colleagues			
A6.3.3	confirm that your customers or colleagues have received and understood the customer information			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit A6: Process information about customers</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
A6a)	your organisation's procedures and guidelines for collecting, retrieving and supplying customer service information									
A6b)	types of personal information about customers that should and should not be kept on record									
A6c)	how to collect information about customers efficiently and effectively									
A6d)	how to operate the customer information storage system									
A6e)	why processing information about customers correctly makes an important contribution to effective customer service									
A6f)	the importance of attention to detail when processing information about customers									
A6g)	legal and regulatory restrictions on the storage and use of customer data									

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Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

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Unit summary sheet

Unit A7: Live up to the customer service promise

This unit is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

You may work in an organisation that has a carefully defined brand and vision that includes a specific service offer and promise to your customers. Often, much work has taken place to develop these, and they influence what your customer expects. By promoting the brand, the organisation is making a promise to your customers about what they can expect. Customer satisfaction is unlikely to be achieved if your 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 your work supports the branding of your services or products. It covers what you must do to make sure that you deliver the promise that your customer has come to expect. It also covers how you can avoid giving your customer an experience that is significantly different from the one offered in the promise.

Customer service standards

When you live up to the promise offered by your organisation you must consistently:

A7.1 Understand and explain the customer service promise

- a7.1.1 explain the key features of the service offer, vision and promise your organisation has made
- a7.1.2 identify the role you can play to ensure that your customer believes that the service offer, vision and promise is being delivered
- a7.1.3 explain the procedures and regulations your organisation follows to support the service offer, vision and promise
- a7.1.4 devise and use phrases that reinforce the service offer, vision and promise
- a7.1.5 identify and avoid phrases that might be used, but would not fit with the service offer, vision and promise
- a7.1.6 identify moments and actions within the delivery of customer service that are particularly relevant to your customer's experience of the promise being delivered
- a7.1.7 share ideas with colleagues about how particular words and approaches help to support the service offer, vision and promise

A7.2 Produce customer satisfaction by delivering the customer service promise

- a7.2.1 ensure that your appearance and behaviour supports the organisation's service offer, vision and promise
- a7.2.2 observe or listen to your customer closely to identify opportunities to reinforce their understanding of the service offer, vision and promise

- a7.2.3 take actions to deliver customer service in a way that meets your customer's expectations and understanding of the service offer, vision and promise
- a7.2.4 ensure that what you decide to do is realistic and in line with the service offer and promise
- a7.2.5 be positive about and supportive of the service offer and promise

Knowledge and understanding

To be competent at delivering the promise you need to know and understand:

- a7a) 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
- a7b) ways in which staff can contribute to communicating the service vision or promise to customers
- a7c) sales, marketing and/or public relations reasons for defining a service offer, vision and promise
- a7d) how words can be used and adapted to reflect a defined service offer, vision and promise
- a7e) how actions can be used and adapted to reflect a defined service offer, vision and promise

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A7 Live up to the customer service promise				
Element: A7.1 Understand and explain the customer service promise				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
A7.1.1	explain the key features of the service offer and promise your organisation has made			
A7.1.2	identify the role you can play to ensure that your customer believes that the service offer and promise is being delivered			
A7.1.3	explain the procedures and regulations your organisation follows to support the service offer, vision and promise			
A7.1.4	devise and use phrases that reinforce the service offer, vision and promise			
A7.1.5	identify and avoid phrases that might be used, but would not fit with the service offer, vision and promise			
A7.1.6	identify moments and actions within the delivery of customer service that are particularly relevant to your customer's experience of the promise being delivered			
A7.1.7	share ideas with colleagues about how particular words and approaches help to support the service offer, vision and promise			

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Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A7 Live up to the customer service promise				
Element: A7.2 Produce customer satisfaction by delivering the customer service promise				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
A7.2.1	ensure that your appearance and behaviour supports the organisation's service offer, vision and promise			
A7.2.2	observe or listen to your customer closely to identify opportunities to reinforce their understanding of the service offer, vision and promise			
A7.2.3	take actions to deliver customer service in a way that meets your customer's expectations and understanding of the service offer, vision and promise			
A7.2.4	ensure that what you decide to do is realistic and in line with the service offer and promise			
A7.2.5	be positive about and supportive of the service offer and promise			

continued overleaf...

Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit A7: Live up to the customer service promise</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
A7a)	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									
A7b)	ways in which staff can contribute to communicating the service vision or promise to customers									
A7c)	sales, marketing and/or public relations reasons for defining a service offer, vision and promise									
A7d)	how words can be used and adapted to reflect a defined service offer, vision and promise									
A7e)	how actions can be used and adapted to reflect a defined service offer, vision and promise									

continued overleaf...

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
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Unit summary sheet

Unit A8: Make customer service personal

This unit is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

Research has shown that customer satisfaction increases if your customer feels that they have been treated in a way that recognises their own personal needs. When you are delivering customer service you 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 you can do to make each customer feel that they have had your complete attention and have been dealt with personally increases their sense of satisfaction. This unit is about how you can help your customers feel that they have experienced service that focuses on them as an individual. When you work with a customer you need to give the impression that it is on a 'one to one' basis, that you care what happens to them and that you respect them as an individual.

Customer service standards

When you make customer service personal you must consistently:

A8.1 Identify opportunities for making customer service personal

- a8.1.1 identify which of your organisation's systems or procedures allows you to add a personal touch to your service
- a8.1.2 observe and listen to your customer carefully for signs that will guide how you personalise the service
- a8.1.3 let your customer know that you understand and that you are there to help
- a8.1.4 identify opportunities to help or direct your customer outside of normal routines and procedures
- a8.1.5 identify customers with particular needs who would especially appreciate personal service
- a8.1.6 balance the time you take when giving individual attention to one customer with the needs and expectations of other customers
- a8.1.7 make extra efforts to show how willing and able you are to give a more personal service

A8.2 Treat your customer as an individual

- a8.2.1 greet and deal with your customer in a way that respects them as an individual
- a8.2.2 focus your attention on the customer you are dealing with
- a8.2.3 always communicate with your customer in a friendly and open way
- a8.2.4 use your customer's name when it is known and appropriate

- a8.2.5 follow your organisation's guidelines about giving your customer your own name and contact details
- a8.2.6 concentrate on building a 'one to one' relationship with your customer by making them feel valued and respected

Knowledge and understanding

To be competent at making customer service personal you need to know and understand:

- a8a) how use of your customer's name makes service more personal
- a8b) personality types and their receptiveness to personalised services
- a8c) types of personal information about customers that should and should not be kept on record
- a8d) features of personal service that are most appreciated by customers with individual needs
- a8e) body language and approaches to communication that are generally interpreted as open
- a8f) your organisation's guidelines on actions that are permissible outside of the normal routines and procedures
- a8g) your own preferences and comfort levels relating to how you are willing and able to personalise service

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A8 Make customer service personal				
Element: A8.1 Identify opportunities for making customer service personal				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
A8.1.1	identify which of your organisation's systems or procedures allows you to add a personal touch to your service			
A8.1.2	observe and listen to your customer carefully for signs that will guide how you personalise the service			
A8.1.3	let your customer know that you understand and that you are there to help			
A8.1.4	identify opportunities to help or direct your customer outside of normal routines and procedures			
A8.1.5	identify customers with particular needs who would especially appreciate personal service			
A8.1.6	balance the time you take when giving individual attention to one customer with the needs and expectations of other customers			
A8.1.7	make extra efforts to show how willing and able you are to give a more personal service			

continued overleaf...

Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A8 Make customer service personal				
Element: A8.2 Treat your customer as an individual				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
A8.2.1	greet and deal with your customer in a way that respects them as an individual			
A8.2.2	focus your attention on the customer you are dealing with			
A8.2.3	always communicate with your customer in a friendly and open way			
A8.2.4	use your customer's name when it is known and appropriate			
A8.2.5	follow your organisation's guidelines about giving your customer your own name and contact details			
A8.2.6	concentrate on building a 'one to one' relationship with your customer by making them feel valued and respected			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit A8: Make customer service personal</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
8a)	how use of your customer's name makes service more personal									
8b)	personality types and their receptiveness to personalised services									
8c)	types of personal information about customers that should and should not be kept on record									
8d)	features of personal service that are most appreciated by customers with individual needs									
8e)	body language and approaches to communication that are generally interpreted as open									
8f)	your organisation's guidelines on actions that are permissible outside of the normal routines and procedures									

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Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
8g) your own preferences and comfort levels relating to how you are willing and able to personalise service									

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit A9: Go the extra mile in customer service

This unit is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

When your customer feels that you 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 your customer's experience depend on you spotting what they will particularly appreciate. Often you can offer this little extra when sorting out a difficulty or problem. Whatever special service you give when you "go the extra mile" must be within your 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.

Customer service standards

When you go the extra mile in customer service you must consistently:

A9.1 Distinguish between routine service standards and going the extra mile

- a9.1.1 explain the service offer clearly and concisely
- a9.1.2 identify your customer's expectations and needs
- a9.1.3 match the service offer with your customer's expectations and needs and identify the key differences
- a9.1.4 identify options for other actions that will give added value customer service and might impress your customer
- a9.1.5 choose actions that are most appropriate to impress your customer

A9.2 Check that your extra mile ideas are feasible

- a9.2.1 match your ideas for added value customer service against your authority to see them through
- a9.2.2 check that your ideas for added value customer service are possible within your organisation's guidelines
- a9.2.3 check that your ideas for added value customer service are possible within regulatory boundaries
- a9.2.4 check that your ideas for added value customer service will not unreasonably affect the service to your other customers
- a9.2.5 explain your ideas for added value service to a senior colleague or other appropriate authority

A9.3 Go the extra mile

- a9.3.1 take action to go the extra mile in customer service
- a9.3.2 ensure that your customer is aware of the added value of your actions
- a9.3.3 monitor the effects of your added value actions to ensure that the service given to your other customers is not affected unreasonably
- a9.3.4 note and pass on positive feedback from your customer about your actions
- a9.3.5 suggest that an extra mile action becomes routine if you have seen it work several times and it could be accommodated within the service offer

Knowledge and understanding

To be competent at going the extra mile in customer service you need to know and understand:

- a9a) your organisation's service offer
- a9b) how customers form expectations of the service they will receive
- a9c) what types of service action most customers will see as adding value to the customer service they have already had
- a9d) your organisation's rules and procedures that determine your authority to go the extra mile
- a9e) relevant legislation and regulation that impact on your freedom to go the extra mile
- a9f) how your organisation receives customer service feedback on the types of customer experience that has impressed them
- a9g) your organisation's procedures for making changes in its service of

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A9 Go the extra mile in customer service				
Element: A9.1 Distinguish between routine service standards and going the extra mile				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
A9.1.1	explain the service offer clearly and concisely			
A9.1.2	identify your customer's expectations and needs			
A9.1.3	match the service offer with your customer's expectations and needs and identify the key differences			
A9.1.4	identify options for other actions that will give added value customer service and might impress your customer			
A9.1.5	choose actions that are most appropriate to impress your customer.			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A9 Go the extra mile in customer service				
Element: A9.2 Check that your extra mile ideas are feasible				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
A9.2.1	match your ideas for added value customer service against your authority to see them through			
A9.2.2	check that your ideas for added value customer service are possible within your organisation's guidelines			
A9.2.3	check that your ideas for added value customer service are possible within regulatory boundaries			
A9.2.4	check that your ideas for added value customer service will not unreasonably affect the service to your other customers			
A9.2.5	explain your ideas for added value service to a senior colleague or other appropriate authority			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A9 Go the extra mile in customer service				
Element: A9.3 Go the extra mile				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
A9.3.1	take action to go the extra mile in customer service			
A9.3.2	ensure that your customer is aware of the added value of your actions			
A9.3.3	monitor the effects of your added value actions to ensure that the service given to your other customers is not affected unreasonably			
A9.3.4	note and pass on positive feedback from your customer about your actions			
A9.3.5	suggest that an extra mile action becomes routine if you have seen it work several times and it could be accommodated within the service offer			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit A9: Go the extra mile in customer service</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
A9a)	your organisation's service offer									
A9b)	how customers form expectations of the service they will receive									
A9c)	what types of service action most customers will see as adding value to the customer service they have already had									
A9d)	your organisation's rules and procedures that determine your authority to go the extra mile									
A9e)	relevant legislation and regulation that impact on your freedom to go the extra mile									
A9f)	how your organisation receives customer service feedback on the types of customer experience that has impressed them									
A9g)	your organisation's procedures for making changes in its service offer.									

continued overleaf...

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

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	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit A10: Deal with customers face to face

This unit is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

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

Customer service standards

When you are dealing with customers face to face you must consistently:

A10.1 Communicate effectively with your customer

- a10.1.1 plan a conversation with your customer that has structure and clear direction
- a10.1.2 hold a conversation with your customer that establishes rapport
- a10.1.3 focus on your customer and listen carefully to ensure that you collect all possible information you need from the conversation
- a10.1.4 explain your services or products and your organisation's service offer to your customer clearly and concisely
- a10.1.5 adapt your communication to meet the individual needs of your customer
- a10.1.6 anticipate your customer's requests and needs for information
- a10.1.7 balance conflicting demands for your attention whilst maintaining rapport with your current customer
- a10.1.8 calm down situations when one customer is adversely affecting the customer service enjoyed by other customers

A10.2 Improve the rapport with your customer through body language

- a10.2.1 present a professional and respectful image when dealing with your customer
- a10.2.2 show an awareness of your customer's needs for personal space
- a10.2.3 focus your attention on your customer so that non-verbal signs do not betray disinterest, boredom or irritation
- a10.2.4 ensure that your customer focus is not disrupted by colleagues

- a10.2.5 observe all customers and the total customer service situation whilst maintaining rapport with your current customer
- a10.2.6 observe your customer to read non-verbal clues about their wishes and expectations

Knowledge and understanding

People competent at dealing with customers face to face know and understand:

- a10a) the importance of speaking clearly and slowly when dealing with a customer face to face
- a10b) the importance of taking the time to listen carefully to what the customer is saying
- a10c) your organisation's procedures that impact on the way you are able to deal with your customers face to face
- a10d) the features and benefits of your organisation's services or products
- a10e) your organisation's service offer and how it affects the way you deal with customers face to face
- a10f) the principles of body language that enable you to interpret customer feelings without verbal communication
- a10g) the difference between behaving assertively, aggressively and passively
- a10h) why the expectations and behaviour of individual customers will demand different responses to create rapport and achieve customer satisfaction
- a10i) the agreed and recognised signs in customer behaviour in your organisation that indicate that your customer expects a particular action by you

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A10 Deal with customers face to face				
Element: A10.1 Communicate effectively with your customer				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
A10.1.1 plan a conversation with your customer that has structure and clear direction				
A10.1.2 hold a conversation with your customer that establishes rapport				
A10.1.3 focus on your customer and listen carefully to ensure that you collect all possible information you need from the conversation				
A10.1.4 explain your services or products and your organisation's service offer to your customer clearly and concisely				
A10.1.5 adapt your communication to meet the individual needs of your customer				
A10.1.6 anticipate your customer's requests and needs for information				
A10.1.7 balance conflicting demands for your attention whilst maintaining rapport with your current customer				
A10.1.8 calm down situations when one customer is adversely affecting the customer service enjoyed by other customers				

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Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A10 Deal with customers face to face				
Element: A10.2 Improve the rapport with your customer through body language				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
A10.2.1 present a professional and respectful image when dealing with your customer				
A10.2.2 show an awareness of your customer's needs for personal space				
A10.2.3 focus your attention on your customer so that non-verbal signs do not betray disinterest, boredom or irritation				
A10.2.4 ensure that your customer focus is not disrupted by colleagues				
A10.2.5 observe all customers and the total customer service situation whilst maintaining rapport with your current customer				
A10.2.6 observe your customer to read non-verbal clues about their wishes and expectations				

continued overleaf...

Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit A10: Deal with customers face to face</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
A10a)	the importance of speaking clearly and slowly when dealing with a customer face to face									
A10b)	the importance of taking the time to listen carefully to what the customer is saying									
A10c)	your organisation's procedures that impact on the way you are able to deal with your customers face to face									
A10d)	the features and benefits of your organisation's services or products									
A10e)	your organisation's service offer and how it affects the way you deal with customers face to face									
A10f)	the principles of body language that enable you to interpret customer feelings without verbal communication									

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Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
A10g) the difference between behaving assertively, aggressively and passively									
A10h) why the expectations and behaviour of individual customers will demand different responses to create rapport and achieve customer satisfaction									
A10i) the agreed and recognised signs in customer behaviour in your organisation that indicate that your customer expects a particular action by you									

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

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COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit A11: Deal with incoming telephone calls from customers

This unit is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

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.

Customer service standards

When you are dealing with incoming telephone calls from customers you must consistently:

A11.1 Use communication systems effectively

- a11.1.1 operate telecommunication equipment efficiently and effectively
- a11.1.2 speak clearly and slowly and adapt your speech to meet the individual needs of your customer
- a11.1.3 listen carefully when collecting information from your customer
- a11.1.4 select the information you need to record and store following your organisation's guidelines
- a11.1.5 update your customer records during or after the call to reflect the key points of the conversation

A11.2 Establish rapport with customers who are calling

- a11.2.1 greet your customer following your organisation's guidelines
- a11.2.2 listen closely to your customer to identify their precise reason for calling and what outcome they are seeking from the call
- a11.2.3 confirm the identity of your customer following organisational guidelines
- a11.2.4 use effective and assertive questions to clarify your customer's requests

A11.3 Deal effectively with customer questions and requests

- a11.3.1 identify all the options you have for responding to your customer and weigh up the benefits and drawbacks of each
- a11.3.2 choose the option that is most likely to lead to customer satisfaction within the service offer

- a11.3.3 give clear and concise information to customers in response to questions or requests
- a11.3.4 use questions and answers to control the length of the conversation
- a11.3.5 keep your customer regularly informed about your actions when accessing information to provide responses or if they are going to be on hold for a period of time
- a11.3.6 put your customer on hold and ensure you cannot be heard if you are discussing action with others or calling a colleague
- a11.3.7 summarise the outcome of the call and any actions that you or your customer will take as a result
- a11.3.8 check before the call is finished that your customer is content that all their questions or requests have been dealt with
- a11.3.9 complete any follow up actions agreed during the call
- a11.3.10 take a clear message for a colleague if you are unable to deal with some aspect of your customer's questions or requests
- a11.3.11 ensure that promises to call back are kept

Knowledge and understanding

To be competent at dealing with incoming telephone calls from customers you need to know and understand:

- a11a) your organisation's guidelines and procedures for the use of telecommunication equipment
- a11b) how to operate your organisation's telecommunication equipment
- a11c) the importance of speaking clearly and slowly when dealing with customers by telephone
- a11d) the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone
- a11e) the importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand
- a11f) what information it is important to note during or after telephone conversations with customers
- a11g) your organisation's guidelines and procedures for what should be said during telephone conversations with customers
- a11h) the importance of keeping your customer informed if they are on hold during a call
- a11i) the importance of not talking across an open line
- a11j) what details should be included if taking a message for a colleague
- a11k) your organisation's guidelines and procedures for taking action to follow up calls made to customers
- a11l) your organisation's guidelines for handling abusive calls

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title A11: Deal with incoming telephone calls from customers				
Element A11.1: Use communication systems effectively				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
A11.1.1 operate telecommunication equipment efficiently and effectively				
A11.1.2 speak clearly and slowly and adapt your speech to meet the individual needs of your customer				
A11.1.3 listen carefully when collecting information from your customer				
A11.1.4 select the information you need to record and store following your organisation's guidelines				
A11.1.5 update your customer records during or after the call to reflect the key points of the conversation				

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title A11: Deal with incoming telephone calls from customers				
Element A11.2: Establish rapport with customers who are calling				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
A11.2.1 greet your customer following your organisation's guidelines				
A11.2.2 listen closely to your customer to identify their precise reason for calling and what outcome they are seeking from the call				
A11.2.3 confirm the identity of your customer following organisational guidelines				
A11.2.4 use effective and assertive questions to clarify your customer's requests				

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title A11: Deal with incoming telephone calls from customers				
Element A11.2: Deal effectively with customer questions and requests				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
A11.3.1 identify all the options you have for responding to your customer and weigh up the benefits and drawbacks of each				
A11.3.2 choose the option that is most likely to lead to customer satisfaction within the service offer				
A11.3.3 give clear and concise information to customers in response to questions or requests				
A11.3.4 use questions and answers to control the length of the conversation				
A11.3.5 keep your customer regularly informed about your actions when accessing information to provide responses or if they are going to be on hold for a period of time				
A11.3.6 put your customer on hold and ensure you cannot be heard if you are discussing action with others or calling a colleague				
A11.3.7 summarise the outcome of the call and any actions that you or your customer will take as a result				

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Performance criteria: You need to show that:	<i>(Assessor to insert date each time competence is demonstrated)</i>			
A11.3.8 check before the call is finished that your customer is content that all their questions or requests have been dealt with				
A11.3.9 complete any follow up actions agreed during the call				
A11.3.10 take a clear message for a colleague if you are unable to deal with some aspect of your customer's questions or requests				
A11.3.11 ensure that promises to call back are kept				

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit A11: Deal with incoming telephone calls from customers</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
A11a)	your organisation's guidelines and procedures for the use of telecommunication equipment									
A11b)	how to operate your organisation's telecommunication equipment									
A11c)	the importance of speaking clearly and slowly when dealing with customers by telephone									
A11d)	the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone									
A11e)	the importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand									

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Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
A11f) what information it is important to note during or after telephone conversations with customers									
A11g) your organisation's guidelines and procedures for what should be said during telephone conversations with customers									
A11h) the importance of keeping your customer informed if they are on hold during a call									
A11i) the importance of not talking across an open line									
A11j) what details should be included if taking a message for a colleague									
A11k) your organisation's guidelines and procedures for taking action to follow up calls made to customers									
A11l) your organisation's guidelines for handling abusive calls									

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

continued overleaf...

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit A12: Make telephone calls to customers

This unit is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

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 you have the opportunity to prepare and are therefore more likely to be able to lead the conversation in the direction you want it to go. This unit is about planning and making calls to customers in a way that contributes positively to your organisation's customer service.

Customer service standards

When you are making telephone calls to customers you must consistently:

A12.1 Plan your calls effectively

- a12.1.1 use all appropriate customer information to plan your call
- a12.1.2 anticipate your customer's expectations and assemble all the information you might need before your conversation with your customer
- a12.1.3 identify the objective of your call and the way in which you expect the call to end
- a12.1.4 plan the opening part of your conversation with your customer and anticipate their possible responses

A12.2 Use communication systems effectively

- a12.2.1 operate telecommunication equipment efficiently and effectively
- a12.2.2 speak clearly and slowly and adapt your speech to meet the individual needs of your customer
- a12.2.3 listen carefully when collecting information from your customer
- a12.2.4 select the information you need to record and store following your organisation's guidelines
- a12.2.5 update your customer records during or after the call to reflect the key points of the conversation

A12.3 Make focussed calls to your customer

- a12.3.1 open the conversation positively and establish a rapport with your customer
- a12.3.2 confirm the identity of your customer following organisational guidelines
- a12.3.3 ensure that your customer is aware of the purpose of your call as early as possible
- a12.3.4 respond positively to queries and objections from your customer
- a12.3.5 summarise the outcome of the call and any actions that you or your customer will take as a result
- a12.3.6 complete any follow up actions agreed during the call

Knowledge and understanding

To be competent at making telephone calls to customers you need to know and understand

- a12a) relevant parts of legislation, external regulations and your organisation's procedures relating to the use of customer information to plan calls
- a12b) your organisation's guidelines and procedures for the use of telecommunication technology
- a12c) how to operate your organisation's telecommunication technology
- a12d) the importance of speaking clearly and slowly when dealing with customers by telephone
- a12e) the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone
- a12f) the importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand
- a12g) what information it is important to note during or after telephone conversations with customers
- a12h) your organisation's guidelines and procedures for what should be said during telephone conversations with customers
- a12i) your organisation's guidelines and procedures for taking action to follow up calls made to customers

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A12 Make telephone calls to customers				
Element: A12.1 Plan your calls effectively				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
A12.1.1 use all appropriate customer information to plan your call				
A12.1.2 anticipate your customer's expectations and assemble all the information you might need before your conversation with your customer				
A12.1.3 identify the objective of your call and the way in which you expect the call to end				
A12.1.4 plan the opening part of your conversation with your customer and anticipate their possible responses				

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A12 Make telephone calls to customers				
Element: A12.2 Use communication systems effectively				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
A12.2.1 operate telecommunication equipment efficiently and effectively				
A12.2.2 speak clearly and slowly and adapt your speech to meet the individual needs of your customer				
A12.2.3 listen carefully when collecting information from your customer				
A12.2.4 select the information you need to record and store following your organisation's guidelines				
A12.2.5 update your customer records during or after the call to reflect the key points of the conversation				

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: A12 Make telephone calls to customers				
Element: A12.3 Make focussed calls to your customer				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
A12.3.1 open the conversation positively and establish a rapport with your customer				
A12.3.2 confirm the identity of your customer following organisational guidelines				
A12.3.3 ensure that your customer is aware of the purpose of your call as early as possible				
A12.3.4 respond positively to queries and objections from your customer				
A12.3.5 summarise the outcome of the call and any actions that you or your customer will take as a result				
A12.3.6 complete any follow up actions agreed during the call				

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit A12: Make telephone calls to customer</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
A12a)	relevant parts of legislation, external regulations and your organisation's procedures relating to the use of customer information to plan calls									
A12b)	your organisation's guidelines and procedures for the use of telecommunication technology									
A12c)	how to operate your organisation's telecommunication technology									
A12d)	the importance of speaking clearly and slowly when dealing with customers by telephone									
A12e)	the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone									

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Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
A12f) the importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand									
A12g) what information it is important to note during or after telephone conversations with customers									
A12h) your organisation's guidelines and procedures for what should be said during telephone conversations with customers									
A12i) your organisation's guidelines and procedures for taking action to follow up calls made to customers									

Feedback/comments:	
The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.	
Candidate's signature:	Date:
Assessor's signature:	Date:
Internal verifier's signature:	Date:

continued overleaf...

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Unit summary sheet

Unit B2: Deliver reliable customer service

This unit is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

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

Customer service standards

When you deliver reliable customer service you must consistently:

B2.1 Prepare to deal with your customers

- b2.1.1 keep your knowledge of your organisation's services or products up-to-date
- b2.1.2 ensure that the area you work in is tidy, safe and organised efficiently
- b2.1.3 prepare and arrange everything you need to deal with your customers before your shift or period of work commences

B2.2 Give Consistent Service to Customers

- b2.2.1 make realistic customer service promises to your customers
- b2.2.2 ensure that your promises balance the needs of your customers and your organisation
- b2.2.3 keep your promises to your customers
- b2.2.4 inform your customers if you cannot keep your promises due to unforeseen circumstances
- b2.2.5 recognise when your customers' needs or expectations have changed and adapt your service to meet their new requirements
- b2.2.6 keep your customers informed if delivery of the service needs to involve passing them on to another person or organisation

B2.3 Check customer service delivery

- b2.3.1 check that the service you have given meets your customers' needs and expectations
- b2.3.2 identify when you could have given better service to your customers and how your service could have been improved
- b2.3.3 share information with colleagues and service partners to maintain and improve your standards of service delivery.

Knowledge and understanding

To be competent at delivering reliable customer service you must know and understand:

- b2a) your organisation's services or products
- b2b) your organisation's procedures and systems for delivering customer service
- b2c) methods or systems for measuring an organisation's effectiveness in delivering customer service
- b2d) your organisation's procedures and systems for checking service delivery
- b2e) your organisation's requirements for health and safety in your area of work

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: B2 Deliver reliable customer service				
Element: B2.1 Prepare to deal with your customers				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
B2.1.1	keep your knowledge of your organisation's services or products up-to-date			
B2.1.2	ensure that the area you work in is tidy, safe and organised efficiently			
B2.1.3	prepare and arrange everything you need to deal with your customers before your shift or period of work commences.			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: B2 Deliver reliable customer service				
Element: B2.2 Give consistent service to customers				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
B2.2.1	make realistic customer service promises to your customers			
B2.2.2	ensure that your promises balance the needs of your customers and your organisation			
B2.2.3	keep your promises to your customers			
B2.2.4	inform your customers if you cannot keep your promises due to unforeseen circumstances			
B2.2.5	recognise when your customers' needs or expectations have changed and adapt your service to meet their new requirements			
B2.2.6	keep your customers informed if delivery of the service needs to involve passing them on to another person or organisation			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: B2 Deliver reliable customer service				
Element: B2.3 Check customer service delivery				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
B2.3.1	check that the service you have given meets your customers' needs and expectations			
B2.3.2	identify when you could have given better service to your customers and how your service could have been improved			
B2.3.3	identify when you could have given better service to your customers and how your service could have been improved			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit B2: Deliver reliable customer service</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
B2a)	your organisation's services or products									
B2b)	your organisation's procedures and systems for delivering customer service									
B2c)	methods or systems for measuring an organisation's effectiveness in delivering customer service									
B2d)	your organisation's procedures and systems for checking service delivery									
B2e)	your organisation's requirements for health and safety in your area of work									

continued overleaf...

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

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Unit summary sheet

Unit B3: Deliver customer service on your customer's premises

This unit is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

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 your customer's property. This unit is about the process of providing a service on customer premises whilst ensuring that your customer both enjoys the customer service experience and has confidence that the work you have carried out has been completed successfully. This unit is not simply about working in a different building. Your customer must be somebody who feels real ownership of the premises and is therefore somewhat protective about them. In particular, this unit is for you if your job takes you into your customers' homes.

Customer service standards

When you deliver customer service on your customer's premises you must consistently:

B3.1 Establish a rapport with your customer

- b3.1.1 prepare for a visit to your customer's premises and ensure they know when and why you will be there
- b3.1.2 identify yourself to your customer showing official identification whenever possible
- b3.1.3 show a positive and friendly approach to the service you are about to give
- b3.1.4 use language and behaviour that show respect for your customer
- b3.1.5 explain to your customer exactly what you are going to do and approximately how long you expect the work to take
- b3.1.6 listen to any concerns that your customer may have and reassure them
- b3.1.7 keep your customer informed of progress and about any cause for delay that might take place
- b3.1.8 keep your customer informed of any variation to the work that could involve additional time or cost
- b3.1.9 consult your customer when you have to do work that they had not expected

B3.2 Combine customer service with your other skills and expertise

- b3.2.1 show respect to your customer's premises and possessions by treating them with care
- b3.2.2 make sure your customer is aware of your specialist technical skills
- b3.2.3 take time to give your customer confidence in your knowledge and skills
- b3.2.4 consider the customer service implications of each action and inform your customer of what will be involved
- b3.2.5 inform your customer when you have finished and reinforce how the work has been handled professionally
- b3.2.6 check that your customer is satisfied with the work and listen carefully to any feedback
- b3.2.7 inform your customer of timescales if any follow up work is involved
- b3.2.8 ensure that timescales for follow up work are kept
- b3.2.9 keep your customer informed if timescales for follow up work are not going to be met
- b3.2.10 explain clearly to your customer why you cannot do work that is not specified in the service offer
- b3.2.11 ensure that your customer has the appropriate details to contact your organisation if they need to

Knowledge and understanding

To be competent at delivering customer service on the customer's premises you must know and understand:

- b3a) what you can do to establish a rapport with customers
- b3b) the importance of sensitivity to people's feelings about their own premises and possessions
- b3c) the regulatory and legal restrictions on what you can and cannot do in all aspects of your work
- b3d) the insurance implications of working on your customer's premises
- b3e) the organisational procedures you would take if you cause any accidental damage by you on your customer's premises

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: B3 Deliver customer service on your customer's premises				
Element: B3.1 Establish a rapport with your customer				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
B3.1.1	prepare for a visit to your customer's premises and ensure they know when and why you will be there			
B3.1.2	identify yourself to your customer showing official identification whenever possible			
B3.1.3	show a positive and friendly approach to the service you are about to give			
B3.1.4	use language and behaviour that show respect for your customer			
B3.1.5	explain to your customer exactly what you are going to do and approximately how long you expect the work to take			
B3.1.6	listen to any concerns that your customer may have and reassure them			
B3.1.7	keep your customer informed of progress and about any cause for delay that might take place			

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Performance criteria: You need to show that:	<i>(Assessor to insert date each time competence is demonstrated)</i>			
B3.1.8 keep your customer informed of any variation to the work that could involve additional time or cost				
B3.1.9 consult your customer when you have to do work that they had not expected				

Feedback/comments: 	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: B3 Deliver customer service on your customer's premises				
Element: B3.2 Combine customer service with your other skills and expertise				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
B3.2.1	show respect to your customer's premises and possessions by treating them with care			
B3.2.2	make sure your customer is aware of your specialist technical skills			
B3.2.3	take time to give your customer confidence in your knowledge and skills			
B3.2.4	consider the customer service implications of each action and inform your customer of what will be involved			
B3.2.5	check that your customer is satisfied with the work and listen carefully to any feedback			
B3.2.6	check that your customer is satisfied with the work and listen carefully to any feedback			
B3.2.7	inform your customer of timescales if any follow up work is involved			
B3.2.8	ensure that timescales for follow up work are kept			
B3.2.9	keep your customer informed if timescales for follow up work are not going to be met			

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Performance criteria: You need to show that:	<i>(Assessor to insert date each time competence is demonstrated)</i>			
B3.2.10 explain clearly to your customer why you cannot do work that is not specified in the service offer				
B3.2.11 ensure that your customer has the appropriate details to contact your organisation if they need to				

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit B3: Deliver customer service on your customer's premises</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
B3a)	what you can do to establish a rapport with customers									
B3b)	the importance of sensitivity to people's feelings about their own premises and possessions									
B3c)	the regulatory and legal restrictions on what you can and cannot do in all aspects of your work									
B3d)	the insurance implications of working on your customer's premises									
B3e)	the organisational procedures you would take if you cause any accidental damage by you on your customer's premises									

continued overleaf...

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
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Unit summary sheet

Unit B4: Recognise diversity when delivering customer service

This unit is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

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 your customer. This unit is about how you establish your customer's expectations and needs in a way that takes full account of them as an individual. The unit also covers the way you provide customer service to diverse groups of customers each of which has common likes and dislikes.

Customer service standards

When you recognise diversity while delivering customer service you must consistently:

- B4.1 Respect customers as individuals and promote equality in customer service**
 - b4.1.1 observe verbal and non-verbal clues that provide information about your customer's expectations and needs
 - b4.1.2 identify and avoid features of stereotypes that might be applied to your customer that could carry the risk of causing offence
 - b4.1.3 identify aspects of your customer's appearance or communication which risk leading you to treat them differently
 - b4.1.4 consider aspects of your customer's appearance or communication in the light of your own beliefs about various groups of people that include your customer
 - b4.1.5 question your customer to ensure that the impressions you are forming about their expectations and wishes are based on sound evidence
 - b4.1.6 adjust your interpretation of your customer's expectations and wishes as a result of further evidence you have collected by talking to your customer
- B4.2 Adapt customer service to recognise the different needs and expectations of diverse groups of customers**
 - b4.2.1 follow organisational procedures and guidelines that seek to make customer service inclusive for diverse groups of customers
 - b4.2.2 show respect for your customer's individual beliefs, expectations and needs that may result from their membership of a particular group

- b4.2.3 vary your approach to your customer to take account of their beliefs, expectations and needs that result from their membership of a particular group
- b4.2.4 work with colleagues to identify consistent approaches that team members should adopt when dealing with particular group

Knowledge and understanding

To be competent in recognising diversity when delivering customer service you must know and understand:

- b4a) 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
- b4b) reasons why consideration of diversity and inclusion issues affect customer service
- b4c) organisational guidelines to make customer service inclusive for diverse groups of customers
- b4d) how to observe and interpret non-verbal clues
- b4e) how to listen actively for clues about your customer's expectations and needs
- b4f) techniques for obtaining additional information from customers through tactful and respectful questions
- b4g) behaviour that might cause offence to specific groups of people to whom you regularly provide customer service
- b4h) how to impress specific groups of people to whom you regularly provide customer service

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: B4 Recognise diversity when delivering customer service				
Element: B4.1 Respect customers as individuals and promote equality in customer service				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
B4.1.1	observe verbal and non-verbal clues that provide information about your customer's expectations and needs			
B4.1.2	identify and avoid features of stereotypes that might be applied to your customer that could carry the risk of causing offence			
B4.1.3	identify aspects of your customer's appearance or communication which risk leading you to treat them differently			
B4.1.4	consider aspects of your customer's appearance or communication in the light of your own beliefs about various groups of people that include your customer			
B4.1.5	question your customer to ensure that the impressions you are forming about their expectations and wishes are based on sound evidence			
B4.1.6	adjust your interpretation of your customer's expectations and wishes as a result of further evidence you have collected by talking to your customer			

continued overleaf...

Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: B4 Recognise diversity when delivering customer service				
Element: B4.2 Adapt customer service to recognise the different needs and expectations of diverse groups of customers				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
B4.2.1	follow organisational procedures and guidelines that seek to make customer service inclusive for diverse groups of customers			
B4.2.2	show respect for your customer's individual beliefs, expectations and needs that may result from their membership of a particular group			
B4.2.3	vary your approach to your customer to take account of their beliefs, expectations and needs that result from their membership of a particular group			
B4.2.4	work with colleagues to identify consistent approaches that team members should adopt when dealing with particular group			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5									
Candidate:					Assessor:				
<p>Unit B4: Recognise diversity when delivering customer service</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
B4a) 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									
B4b) reasons why consideration of diversity and inclusion issues affect customer service									
B4c) organisational guidelines to make customer service inclusive for diverse groups of customers									
B4d) how to observe and interpret non-verbal clues									
B4e) how to listen actively for clues about your customer's expectations and needs									
B4f) techniques for obtaining additional information from customers through tactful and respectful questions									

continued overleaf...

Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
B4g) behaviour that might cause offence to specific groups of people to whom you regularly provide customer service									
B4h) how to impress specific groups of people to whom you regularly provide customer service									

Feedback/comments:	
The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.	
Candidate's signature:	Date:
Assessor's signature:	Date:
Internal verifier's signature:	Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit B5: Deal with customers across a language divide

This unit is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

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 services 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 your customer's first language. You should choose this unit if you frequently deal across a language divide. Do not choose this unit if you come across customers who do not share your first language only occasionally.

Customer service standard

When you deal with customers across a language divide you must consistently:

B5.1 Prepare to deal with customers with a different first language

- b5.1.1 identify the language or languages other than your own that you are most likely to come across when dealing with customers
- b5.1.2 learn a greeting, an expression of thanks and a farewell phrase in the language you expect to encounter
- b5.1.3 identify a source of assistance with a language you expect to encounter when delivering customer service
- b5.1.4 agree with colleagues informal signing options that may be used for key aspects of your services or products when dealing with somebody with a different first language
- b5.1.5 log useful words and phrases to support your dealings with a customer with a different first language
- b5.1.6 learn an appropriate phrase to explain to your customer in their first language that you do not speak that language fluently

B5.2 Deal with customers who speak a different first language from your own

- b5.2.1 identify your customer's first language and indicate to them that you are aware of this
- b5.2.2 establish the expectations of your customer regarding whether they expect to deal in your first language or theirs
- b5.2.3 speak clearly and slowly if using a language which is not the first language for either you or your customer

- b5.2.4 maintain a consistent tone and volume when dealing with somebody across a language divide
- b5.2.5 listen closely to your customer to identify any words they may be using in a way that differs from the way you would generally use the same words
- b5.2.6 check your understanding of specific words with your customer using questions for clarification
- b5.2.7 seek appropriate assistance from colleagues if you are unable to complete a customer transaction because of language barriers
- b5.2.8 reword a question or explanation if your customer clearly does not understand your original wording
- b5.2.9 use a few words of your customer's first language to create a rapport

Knowledge and understanding

To be competent at dealing with customers across a language divide you must know and understand:

- b5a) the languages that you are most likely to encounter among groups of your customers
- b5b) how to greet, thank and say farewell to customers in their first languages
- b5c) the importance of dealing with customers in their first language if possible
- b5d) how to explain to a customer that you cannot hold an extended conversation in their first language
- b5e) the importance of tone, pace and volume when dealing with customers across a language divide
- b5f) possible sources of assistance to use when a language barrier demands additional language skills

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: B5 Deal with customers across a language divide				
Element: B5.1 Prepare to deal with customers with a different first language				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
B5.1.1	identify the language or languages other than your own that you are most likely to come across when dealing with customers			
B5.1.2	learn a greeting, an expression of thanks and a farewell phrase in the language you expect to encounter			
B5.1.3	identify a source of assistance with a language you expect to encounter when delivering customer service			
B5.1.4	agree with colleagues informal signing options that may be used for key aspects of your services or products when dealing with somebody with a different first language			
B5.1.5	log useful words and phrases to support your dealings with a customer with a different first language			
B5.1.6	learn an appropriate phrase to explain to your customer in their first language that you do not speak that language fluently			

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Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: Edexcel SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: B5 Deal with customers across a language divide				
Element: B5.2 Deal with customers who speak a different first language from your own				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
B5.2.1	identify your customer's first language and indicate to them that you are aware of this			
B5.2.2	establish the expectations of your customer regarding whether they expect to deal in your first language or theirs			
B5.2.3	speak clearly and slowly if using a language which is not the first language for either you or your customer			
B5.2.4	maintain a consistent tone and volume when dealing with somebody across a language divide			
B5.2.5	listen closely to your customer to identify any words they may be using in a way that differs from the way you would generally use the same words			
B5.2.6	check your understanding of specific words with your customer using questions for clarification			
B5.2.7	seek appropriate assistance from colleagues if you are unable to complete a customer transaction because of language barriers			

Performance criteria: You need to show that:	<i>(Assessor to insert date each time competence is demonstrated)</i>			
B5.2.8 reword a question or explanation if your customer clearly does not understand your original wording				
B5.2.9 use a few words of your customer's first language to create a rapport				

Feedback/comments:

Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit B5: Deal with a customer across a language divide</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
B5a)	the languages that you are most likely to encounter among groups of your customers									
B5b)	how to greet, thank and say farewell to customers in their first languages									
B5c)	the importance of dealing with customers in their first language if possible									
B5d)	how to explain to a customer that you cannot hold an extended conversation in their first language									
B5e)	the importance of tone, pace and volume when dealing with customers across a language divide									
B5f)	possible sources of assistance to use when a language barrier demands additional language skills									

continued overleaf...

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit B6: Use questioning techniques when delivering customer service

This unit is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

This unit is about how you use questioning both in planned sequences and in spontaneous conversation to paint a picture of what your customer wants and how your organisation can deliver it. This unit is for you if you come into contact with your customer face to face, by voice technology or on-line with immediate interaction. This unit is probably not for you if you deal with customers remotely when it takes time to exchange questions and responses.

Customer service standard

When you use questioning techniques when delivering customer service you must consistently:

B6.1 Establish rapport and identify customer concerns

- b6.1.1 greet your customer sincerely and invite a full and open response
- b6.1.2 use planned or spontaneous lines to indicate to your customer that you empathise with their initial enquiry
- b6.1.3 invite more detailed explanation from your customer
- b6.1.4 listen closely to your customer's responses to strengthen your understanding of their concerns
- b6.1.5 use both open and closed questions to make appropriate connection with your customer and open the door to more detailed investigation
- b6.1.6 identify and note your customer's feelings and mood in relation to the information you are seeking

D6.2 Seek detailed information from customers using questioning techniques

- b6.2.1 follow a planned trail of questions to explore in detail customer concerns you have already identified
- b6.2.2 hold a spontaneous conversation with your customer to explore in detail customer concerns you have already identified
- b6.2.3 explain to your customer why you need the information you are asking for
- b6.2.4 use probing and searching questions that draw on comments or words used by your customer
- b6.2.5 thank your customer for the information in a way that encourages further open responses
- b6.2.6 use pre-planned routing and trigger questions that lead your customer to respond in new areas
- b6.2.7 follow organisational procedures to record your customer responses to inform future actions

Knowledge and understanding

To be competent at using questioning techniques when delivering customer service you must know and understand:

- b6a) why establishing rapport makes it easier to draw information from customers
- b6b) ways to greet customers that immediately build rapport
- b6c) reasons for using planned question patterns to draw out particular information
- b6d) reasons for using spontaneous conversation to draw out particular information
- b6e) the importance of active listening when seeking detailed information from customers
- b6f) the differences between and uses of closed and open questions
- b6g) the importance of explaining to customers why information is needed
- b6h) why particular trigger questions are effective in gaining specific information

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: B6 Use questioning techniques when delivering customer service				
Element: B6.1 Establish rapport and identify customer concerns				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
B6.1.1	greet your customer sincerely and invite a full and open response			
B6.1.2	use planned or spontaneous lines to indicate to your customer that you empathise with their initial enquiry			
B6.1.3	invite more detailed explanation from your customer			
B6.1.4	listen closely to your customer's responses to strengthen your understanding of their concerns			
B6.1.5	use both open and closed questions to make appropriate connection with your customer and open the door to more detailed investigation			
B6.1.6	identify and note your customer's feelings and mood in relation to the information you are seeking			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: B6 Use questioning techniques when delivering customer service				
Element: B6.2 Seek detailed information from customers using questioning techniques				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
B6.2.1	follow a planned trail of questions to explore in detail customer concerns you have already identified			
B6.2.2	hold a spontaneous conversation with your customer to explore in detail customer concerns you have already identified			
B6.2.3	explain to your customer why you need the information you are asking for			
B6.2.4	use probing and searching questions that draw on comments or words used by your customer			
B6.2.5	thank your customer for the information in a way that encourages further open responses			
B6.2.6	use pre-planned routing and trigger questions that lead your customer to respond in new areas			
B6.2.7	follow organisational procedures to record your customer responses to inform future actions			

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Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit B6: Use questioning techniques when delivering customer service</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
B6a)	why establishing rapport makes it easier to draw information from customers									
B6b)	ways to greet customers that immediately build rapport									
B61c)	reasons for using planned question patterns to draw out particular information									
B6d)	reasons for using spontaneous conversation to draw out particular									
B6e)	the importance of active listening when seeking detailed information from customers									
B6f)	the differences between and uses of closed and open questions									
B6g)	the importance of explaining to customers why information is needed									
B6h)	why particular trigger questions are effective in gaining specific information									

continued overleaf...

Feedback/comments:

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Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

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Unit summary sheet

Unit B7: Deal with customers using bespoke software

This unit is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

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, you 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 you are using and they must be kept informed of the different steps you are taking. Your use of the system must also ensure that you keep 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 you if you are responsible for delivering service to customers at the same time as operating bespoke service software.

Customer service standard

When you deal with customers using bespoke software you must consistently:

B7.1 Prepare to deliver customer service using bespoke software

- b7.1.1 sign on and open access to appropriate functions in the IT system
- b7.1.2 navigate the architecture and geography of the customer service site to ensure you can access all appropriate areas
- b7.1.3 explore screen or menu routes that are most appropriate for the customer service you are seeking to deliver
- b7.1.4 ensure that you are familiar with the software manual, help screens or help lines to know where to locate technical support when needed
- b7.1.5 prepare your work area to deliver customer service using bespoke software

B7.2 Deliver customer service using bespoke software

- b7.2.1 identify your customer or the services or products they wish to access
- b7.2.2 follow organisational procedures to step through the system in a way that responds to your customer's needs
- b7.2.3 use search or other specialist functions within the software to respond to customer requests
- b7.2.4 enter new records using the bespoke software system
- b7.2.5 amend customer service records in the bespoke software system
- b7.2.6 communicate with your customers in terms they can understand relating to the software system
- b7.2.7 follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software

- b7.2.8 interpret error messages and act on them to support your customer service
- b7.2.9 refer your customer to a colleague following organisational procedures if you are unable to complete the transaction

Knowledge and understanding

To be competent at dealing with customers using bespoke software you must know and understand:

- b7a) access and sign-on routines for the bespoke software system
- b7b) the architecture and geography of the bespoke software system
- b7c) different screen or menu routes that can be followed to meet customer requirements
- b7d) sources of support and help for the bespoke software including manuals, help screens and help lines
- b7e) the importance of preparing a work area before delivering customer service
- b7f) search or other enquiry facilities within the bespoke software system
- b7g) the importance of avoiding jargon and system terminology when communicating with customers
- b7h) ways to respond to error messages when using a bespoke software system
- b7i) referral points and sources of information when you are unable to meet customer needs using the bespoke software system

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: B7 Deal with customers using bespoke software				
Element: B7.1 Prepare to deliver customer service using bespoke software				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
B7.1.1	sign on and open access to appropriate functions in the IT system			
B7.1.2	navigate the architecture and geography of the customer service site to ensure you can access all appropriate areas			
B7.1.3	explore screen or menu routes that are most appropriate for the customer service you are seeking to deliver			
B7.1.4	ensure that you are familiar with the software manual, help screens or help lines to know where to locate technical support when needed			
B7.1.5	prepare your work area to deliver customer service using bespoke software			

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: B7 Deal with customers using bespoke software				
Element: B7.2 Deliver customer service using bespoke software				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
B7.2.1	identify your customer or the services or products they wish to access			
B7.2.2	follow organisational procedures to step through the system in a way that responds to your customer's needs			
B7.2.3	use search or other specialist functions within the software to respond to customer requests			
B7.2.4	enter new records using the bespoke software system			
B7.2.5	amend customer service records in the bespoke software system			
B7.2.6	communicate with your customers in terms they can understand relating to the software system			
B7.2.7	follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software			
B7.2.8	interpret error messages and act on them to support your customer service			
B7.2.9	refer your customer to a colleague following organisational procedures if you are unable to complete the transaction			

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit B7: Deal with customers using bespoke software</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
B7a)	access and sign-on routines for the bespoke software system									
B7b)	the architecture and geography of the bespoke software system									
B7c)	different screen or menu routes that can be followed to meet customer requirements									
B7d)	sources of support and help for the bespoke software including manuals, help screens and help lines									
B7e)	the importance of preparing a work area before delivering customer service									
B7f)	search or other enquiry facilities within the bespoke software system									

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Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
B7g) the importance of avoiding jargon and system terminology when communicating with customers									
B7h) ways to respond to error messages when using a bespoke software system									
B7i) referral points and sources of information when you are unable to meet customer needs using the bespoke software system									

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
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Unit summary sheet

Unit B8: Maintain customer service through effective hand over

This unit is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

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

Customer service standard

When you maintain customer service through effective handover you must consistently:

B8.1 Agree joint responsibilities in a customer service team

- b8.1.1 identify services or products you are involved in delivering that rely on effective teamwork
- b8.1.2 identify steps in the customer service delivery process that rely on exchange of information between you and your colleagues
- b8.1.3 agree with colleagues when it is right to pass responsibility for completing a customer service action to another
- b8.1.4 agree with colleagues how information should be exchanged between you to enable another to complete a customer service action
- b8.1.5 identify ways of reminding yourself when you have passed responsibility to a colleague for completing a customer service action

B8.2 Check that customer service actions are seen through by working together with colleagues

- b8.2.1 access reminders to identify when to check that a customer service action has been completed
- b8.2.2 ensure that you are aware of all details of customer service actions your colleague was due to complete
- b8.2.3 ask your colleague about the outcome of their completing the customer service action as agreed
- b8.2.4 identify the next customer service actions if your colleagues has been unable to complete the actions you had previously agreed
- b8.2.5 work with colleagues to review the way in which customer service actions are shared

Knowledge and understanding

To be competent at maintaining customer service through effective handover you must know and understand:

- b8a) your organisation's customer service procedures for the services or products you are involved in delivering
- b8b) the appropriate colleagues to pass responsibility to for completing particular customer service actions
- b8c) ways of ensuring that information is passed between you and your colleagues effectively
- b8d) ways to remind yourself of actions that need to be checked when you have passed on responsibility to a colleague
- b8e) the importance of checking tactfully with a colleague whether they have completed the customer service actions you were expecting
- b8f) opportunities for contributing to review the way customer service actions are shared in customer service processes

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: B8 Maintain customer service through effective hand over				
Element: B8.1 Agree joint responsibilities in a customer service team				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
B8.1.1	identify services or products you are involved in delivering that rely on effective teamwork			
B8.1.2	identify steps in the customer service delivery process that rely on exchange of information between you and your colleagues			
B8.1.3	agree with colleagues when it is right to pass responsibility for completing a customer service action to another			
B8.1.4	agree with colleagues how information should be exchanged between you to enable another to complete a customer service action			
B8.1.5	identify ways of reminding yourself when you have passed responsibility to a colleague for completing a customer service action.			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: B8 Maintain customer service through effective hand over				
Element: B8.2 Check that customer service actions are seen through by working together with colleagues				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
B8.2.1	access reminders to identify when to check that a customer service action has been completed			
B8.2.2	ensure that you are aware of all details of customer service actions your colleague was due to complete			
B8.2.3	ask your colleague about the outcome of their completing the customer service action as agreed			
B8.2.4	identify the next customer service actions if your colleagues has been unable to complete the actions you had previously agreed			
B8.2.5	work with colleagues to review the way in which customer service actions are shared			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit B8: Maintain customer service through effective hand over</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence, eg answers to questions. The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
B8a)	your organisation's customer service procedures for the services or products you are involved in delivering									
B8b)	the appropriate colleagues to pass responsibility to for completing particular customer service actions									
B8c)	ways of ensuring that information is passed between you and your colleagues effectively									
B8d)	ways to remind yourself of actions that need to be checked when you have passed on responsibility to a colleague									
B8e)	the importance of checking tactfully with a colleague whether they have completed the customer service actions you were expecting									
B8f)	opportunities for contributing to review the way customer service actions are shared in customer service processes									

continued overleaf...

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit C3: Resolve customer service problems

This unit is part of the Customer Service Theme of Handling Problems. This Theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

This unit is about what to do when it is difficult to meet customer expectations. Even if the service you give is excellent, some customers experience problems. Part of your 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 your customer's expectations involve more than you can offer or because your service procedures have not been followed. Some problems are reported by customers and sometimes you spot the problem first and resolve it before your customer has even noticed. As soon as you are aware of a problem, you 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 your organisation is by the way problems are handled.

Customer service standards

When you resolve customer service problems you must consistently:

C3.1 Spot customer service problems

- c3.1.1 listen carefully to your customers about any problem they have raised
- c3.1.2 ask your customers about the problem to check your understanding
- c3.1.3 recognise repeated problems and alert the appropriate authority
- c3.1.4 share customer feedback with others to identify potential problems before they happen
- c3.1.5 identify problems with systems and procedures before they begin to affect your customers

C3.2 Pick the best solution to resolve customer service problems

- c3.2.1 identify the options for resolving a customer service problem
- c3.2.2 work with others to identify and confirm the options to resolve a customer service problem
- c3.2.3 work out the advantages and disadvantages of each option for your customer and your organisation
- c3.2.4 pick the best option for your customer and your organisation
- c3.2.5 identify for your customer other ways that problems may be resolved if you are unable to help

C3.3 Take action to resolve customer service problems

- c3.3.1 discuss and agree the options for solving the problem with your customer
- c3.3.2 take action to implement the option agreed with your customer

- c3.3.3 work with others and your customer to make sure that any promises related to solving the problem are kept
- c3.3.4 keep your customer fully informed about what is happening to resolve the problem
- c3.3.5 check with your customer to make sure the problem has been resolved to their satisfaction
- c3.3.6 give clear reasons to your customer when the problem has not been resolved to their satisfaction

Knowledge and understanding

To be competent in resolving customer service problems you must know and understand:

- c3a) organisational procedures and systems for dealing with customer service problems
- c3b) how to defuse potentially stressful situations
- c3c) how to negotiate
- c3d) the limitations of what you can offer your customer
- c3e) types of action that may make a customer problem worse and should be avoided

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: C3 Resolve customer service problems				
Element: C3.1 Spot customer service problems				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
C3.1.1	listen carefully to your customers about any problem they have raised			
C3.1.2	ask your customers about the problem to check your understanding			
C3.1.3	recognise repeated problems and alert the appropriate authority			
C3.1.4	share customer feedback with others to identify potential problems before they happen			
C3.1.5	identify problems with systems and procedures before they begin to affect your customers			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: C3 Resolve customer service problems				
Element: C3.2 Pick the best solution to resolve customer service problems				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
C3.2.1	identify the options for resolving a customer service problem			
C3.2.2	work with others to identify and confirm the options to resolve a customer service problem			
C3.2.3	work out the advantages and disadvantages of each option for your customer and your organisation			
C3.2.4	pick the best option for your customer and your organisation			
C3.2.5	identify for your customer other ways that problems may be resolved if you are unable to help			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: C3 Resolve customer service problems				
Element: C3.3 Take action to resolve customer service problems				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
C3.3.1	discuss and agree the options for solving the problem with your customer			
C3.3.2	take action to implement the option agreed with your customer			
C3.3.3	work with others and your customer to make sure that any promises related to solving the problem are kept			
C3.3.4	keep your customer fully informed about what is happening to resolve the problem			
C3.3.5	check with your customer to make sure the problem has been resolved to their satisfaction			
C3.3.6	give clear reasons to your customer when the problem has not been resolved to their satisfaction			

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Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit C3: Resolve customer service problems</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
C3a)	organisational procedures and systems for dealing with customer service problems									
C3b)	how to defuse potentially stressful situations									
C3c)	how to negotiate									
C3d)	the limitations of what you can offer your customer									
C3e)	types of action that may make a customer problem worse and should be avoided									

continued overleaf...

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
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Unit summary sheet

Unit C4: Deliver customer service to difficult customers

This unit is part of the Customer Service Theme of Handling Problems. This Theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

Many organisations have a significant proportion of difficult customers. Your customer's attitude may be difficult simply because they believe that a threat or problem exists before they contact your organisation. They may become difficult or even aggressive when they discover that their expectations are not going to be met by your organisation. They may be very concerned or nervous about the outcome of dealing with your organisation. In either case, they are difficult to deal with and need your 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. You should choose this unit only if you recognise the content as applying to a reasonable proportion of your exchanges with customers. Do not choose this unit if it will be hard to find evidence because you only occasionally deal with a difficult customer.

Customer service standard

When you deliver customer service to difficult customers you must consistently:

C4.1 Recognise when customers may be difficult to deal with

- c4.1.1 recognise types of customer behaviour that are difficult to deal with
- c4.1.2 identify aspects of your organisation's services or products that make it difficult to deal with customers
- c4.1.3 identify the signs and signals that indicate a customer may be difficult to deal with
- c4.1.4 put yourself in your customer's position and see the situation from their point of view
- c4.1.5 identify reasons why your customers may be behaving in a way that is difficult to deal with
- c4.1.6 recognise the limits of difficult customer behaviour that your organisation will tolerate
- c4.1.7 identify things that you may do or say that will provoke difficult responses from your customer

C4.2 Deal with difficult customers

- c4.2.1 listen patiently to what your customer wants to tell you
- c4.2.2 use direct and factual questions about your customer's feelings and what has happened to identify what might satisfy them
- c4.2.3 check your understanding of your customer's concerns by describing your view of the situation and options that might be available

- c4.2.4 express empathy with your customer without necessarily admitting fault on the part of your organisation
- c4.2.5 give clear statements or explanations of your organisation's position
- c4.2.6 agree a way forward that balances customer satisfaction with the needs of your organisation
- c4.2.7 enlist help from colleagues if options for action are outside of your authority
- c4.2.8 summarise clearly actions to be taken and reasons for those actions to complete the customer transaction
- c4.2.9 advise your manager or the appropriate colleagues if your customer is likely to re-open the matter with them
- c4.2.10 take any necessary action to protect your own safety or that of other customers or colleagues from a difficult customer

Knowledge and understanding

To be competent at delivering customer service to difficult customers you must know and understand:

- c4a) the types of customer behaviour that you personally find difficult to deal with
- c4b) reasons why some aspect of your organisation's services or products may provoke difficult behaviour from customers
- c4c) reasons why your customer's own actions may cause them to behave in a way that is difficult to deal with
- c4d) the meaning of having empathy for a customer's feelings
- c4e) who can be asked for help when dealing with a difficult customer
- c4f) the difference between assertive, aggressive and passive behaviour
- c4g) the importance of not simply quoting your organisation's rules and procedures to counter your customer's difficult behaviour
- c4h) your organisation's limits of what will be tolerated from difficult customers before the transaction or relationship is closed
- c4i) the importance of giving your manager or the appropriate colleagues notice of any further approaches from a difficult customer
- c4j) when it might be necessary to take action to protect your own safety or that of other customers or colleagues from a difficult customer

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: C4 Deliver customer service to difficult customers				
Element: C4.1 Recognise when customers may be difficult to deal with				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
C4.1.1	recognise types of customer behaviour that are difficult to deal with			
C4.1.2	identify aspects of your organisation's services or products that make it difficult to deal with customers			
C4.1.3	identify the signs and signals that indicate a customer may be difficult to deal with			
C4.1.4	put yourself in your customer's position and see the situation from their point of view			
C4.1.5	identify reasons why your customers may be behaving in a way that is difficult to deal with			
C4.1.6	recognise the limits of difficult customer behaviour that your organisation will tolerate			
C4.1.7	identify things that you may do or say that will provoke difficult responses from your customer			

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Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: C4 Deliver customer service to difficult customers				
Element: C4.2 Deal with difficult customers				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
C4.2.1	listen patiently to what your customer wants to tell you			
C4.2.2	use direct and factual questions about your customer's feelings and what has happened to identify what might satisfy them			
C4.2.3	check your understanding of your customer's concerns by describing your view of the situation and options that might be available			
C4.2.4	express empathy with your customer without necessarily admitting fault on the part of your organisation			
C4.2.5	give clear statements or explanations of your organisation's position			
C4.2.6	agree a way forward that balances customer satisfaction with the needs of your organisation			
C4.2.7	enlist help from colleagues if options for action are outside of your authority			
C4.2.8	summarise clearly actions to be taken and reasons for those actions to complete the customer transaction			

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Performance criteria: You need to show that:	<i>(Assessor to insert date each time competence is demonstrated)</i>			
C4.2.9 advise your manager or the appropriate colleagues if your customer is likely to re-open the matter with them				
C4.2.10 take any necessary action to protect your own safety or that of other customers or colleagues from a difficult customer				

Feedback/comments: 	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit C4: Deliver customer service to difficult customers</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
C4a)	the types of customer behaviour that you personally find difficult to deal with									
C4b)	reasons why some aspect of your organisation's services or products may provoke difficult behaviour from customers									
C4c)	reasons why your customer's own actions may cause them to behave in a way that is difficult to deal with									
C4d)	the meaning of having empathy for a customer's feelings									
C4e)	who can be asked for help when dealing with a difficult customer									
C4f)	the difference between assertive, aggressive and passive behaviour									

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Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
C4g) the importance of not simply quoting your organisation's rules and procedures to counter your customer's difficult behaviour									
C4h) your organisation's limits of what will be tolerated from difficult customers before the transaction or relationship is closed									
C4i) the importance of giving your manager or the appropriate colleagues notice of any further approaches from a difficult customer									
C4j) when it might be necessary to take action to protect your own safety or that of other customers or colleagues from a difficult customer									

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

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Unit Summary sheet

Unit C5: Monitor and solve customer service problems

This unit is part of the Customer Service Theme of Handling Problems. This Theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

Your job involves delivering and organising excellent customer service. However good the service provided, some of your customers will experience problems and you will spot and solve other problems before your customers even know about them. This Unit is about the part of your 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 your customer service by the way that you solve customer service problems. You 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.

Customer service standards

When you monitor and solve customer service problems you must consistently:

C5.1 Solve immediate customer service problems

- c5.1.1 respond positively to customer service problems following organisational guidelines
- c5.1.2 solve customer service problems when you have sufficient authority
- c5.1.3 work with others to solve customer service problems
- c5.1.4 keep customers informed of the actions being taken
- c5.1.5 check with customers that they are comfortable with the actions being taken
- c5.1.6 solve problems with service systems and procedures that might affect customers before they become aware of them
- c5.1.7 inform managers and colleagues of the steps taken to solve specific problems

C5.2 Identify repeated customer service problems and options for solving them

- c5.2.1 identify repeated customer service problems
- c5.2.2 identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option
- c5.2.3 work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of your organisation

C5.3 Take action to avoid the repetition of customer service problems

- c5.3.1 obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated
- c5.3.2 action your agreed solution
- c5.3.3 keep your customers informed in a positive and clear manner of steps being taken to solve any service problems
- c5.3.4 monitor the changes you have made and adjust them if appropriate

Knowledge and understanding

To be competent at monitoring and solving customer service problems you need to know and understand:

- c5a) organisational procedures and systems for dealing with customer service problems
- c5b) organisational procedures and systems for identifying repeated customer service problems
- c5c) 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
- c5d) how to negotiate with and reassure customers while their problems are being solved

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: C5 Monitor and solve customer service problems				
Element: C5.1 Solve immediate customer service problems				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
C5.1.1	respond positively to customer service problems following organisational guidelines			
C5.1.2	solve customer service problems when you have sufficient authority			
C5.1.3	work with others to solve customer service problems			
C5.1.4	keep customers informed of the actions being taken			
C5.1.5	check with customers that they are comfortable with the actions being taken			
C5.1.6	solve problems with service systems and procedures that might affect customers before they become aware of them			
C5.1.7	inform managers and colleagues of the steps taken to solve specific problems			

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Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Element achievement record

SVQ title and level:SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: C5 Monitor and solve customer service problems				
Element: C5.2 Identify repeated customer service problems and options for solving them				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
C5.2.1	identify repeated customer service problems			
C5.2.2	identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option			
C5.2.3	work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of your organisation			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

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Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: C5 Monitor and solve customer service problems				
Element: C5.3 Take action to avoid the repetition of customer service problems				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
C5.3.1	obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated			
C5.3.2	action your agreed solution			
C5.3.3	keep your customers informed in a positive and clear manner of steps being taken to solve any service problems			
C5.3.4	monitor the changes you have made and adjust them if appropriate			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge Evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit C5: Monitor and solve customer service problems</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:				Type of evidence						
				EI	O	P	WT	S	APEL	Q&A Date
C5a)	organisational procedures and systems for dealing with customer service problems									
C5b)	organisational procedures and systems for identifying repeated customer service problems									
C5c)	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									
C5d)	how to negotiate with and reassure customers while their problems are being solved									

continued overleaf...

Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

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	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit C6: Apply risk assessment to customer service

This unit is part of the Customer Service Theme of Handling Problems. This Theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

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 you to take actions to minimise risks.

Customer service standards

When you apply risk assessment to customer service you must consistently:

C6.1 Analyse customer service processes for risk

- c6.1.1 Identify different steps and stages in the customer service process and the moments of truth that offer most opportunity to impress or to disappoint customers
- c6.1.2 identify the financial risks for each stage of the customer service process
- c6.1.3 identify the reputation risks for each stage of the customer service process
- c6.1.4 identify the health and safety risks for each stage of the customer service process
- c6.1.5 identify the risk of delivering sub-standard services or products for each stage of the customer service process
- c6.1.6 ensure that your customers are aware of any risks that might impact on them
- c6.1.7 develop staff awareness of the risks you have identified

C6.2 Assess customer service risks and take appropriate actions

- c6.2.1 assess the probabilities of each risk that you have identified
- c6.2.2 assess the consequence of each risk in terms of finance, reputation and health and safety
- c6.2.3 classify each risk as high, medium or low taking into account its probability and consequences
- c6.2.4 work with colleagues to identify any actions that might be taken to reduce risk
- c6.2.5 take appropriate actions to minimise the overall customer service risk profile by adapting procedures

Knowledge and understanding

To be competent at applying risk assessment to customer service you need to know and understand:

- c6a) your 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)
- c6b) risk assessment techniques
- c6c) how to evaluate risk according to probability of occurrence and consequences of occurrence
- c6d) the nature of potential customer service risks including financial, reputation and health and safety risks
- c6e) cost/benefit analysis
- c6f) SWOT (Strengths, Weaknesses, Opportunities, Threats) and PESTLE (Political, Economic, Social, Technological, Legal, Environmental) analysis

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: C6 Apply risk assessment to customer service				
Element: C6.1 Analyse customer service processes for risk				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
C6.1.1	Identify different steps and stages in the customer service process and the moments of truth that offer most opportunity to impress or to disappoint customers			
C6.1.2	identify the financial risks for each stage of the customer service process			
C6.1.3	identify the reputation risks for each stage of the customer service process			
C6.1.4	identify the health and safety risks for each stage of the customer service process			
C6.1.5	check with customers that they are comfortable with the actions being taken			
C6.1.6	ensure that your customers are aware of any risks that might impact on them			
C6.1.7	develop staff awareness of the risks you have identified			

continued overleaf...

Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: C6 Apply risk assessment to customer service				
Element: C6.2 Assess customer service risks and take appropriate actions				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
C6.2.1	assess the probabilities of each risk that you have identified			
C6.2.2	assess the consequence of each risk in terms of finance, reputation and health and safety			
C6.2.3	classify each risk as high, medium or low taking into account its probability and consequences			
C6.2.4	work with colleagues to identify any actions that might be taken to reduce risk			
C6.2.5	take appropriate actions to minimise the overall customer service risk profile by adapting procedures			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5									
Candidate:					Assessor:				
<p>Unit C6: Apply risk assessment to customer service</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
C6a) your 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)									
C6b) risk assessment techniques									
C6c) how to evaluate risk according to probability of occurrence and consequences of occurrence									
C6d) the nature of potential customer service risks including financial, reputation and health and safety risks									
C6e) cost/benefit analysis									
C6f) SWOT (Strengths, Weaknesses, Opportunities, Threats) and PESTLE (Political, Economic, Social, Technological, Legal, Environmental) analysis									

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Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

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	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit C7: Process customer service complaints

This unit is part of the Customer Service Theme of Handling Problems. This Theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

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 your customer expects you to respond and to offer some resolution or compensation. Complaints require investigation and the different options for their resolution to be considered. Your organisation may have detailed and formal procedures for dealing with complaints.

Customer service standards

When you process customer service complaints you must consistently:

- C7.1 Recognise the signs that a query or problem is about to produce a complaint**
 - c7.1.1 identify signs that a customer is becoming dissatisfied with the customer service of your organisation
 - c7.1.2 take action to change the situation so that the query or problem does not result in a complaint
 - c7.1.3 take actions to change your customer service approach in order to avoid future complaints when a justified complaint has been made
- C7.2 Deal with a complaint effectively**
 - c7.2.1 ensure that you have a clear understanding of the nature and details of the complaint
 - c7.2.2 investigate the facts of the complaint in order to establish whether it should be dealt with as a justified complaint or an unjustified complaint
 - c7.2.3 identify all the possible options for a solution and consider the benefits and drawbacks of each option for your customer and for your organisation
 - c7.2.4 assess the risks to your organisation of choosing each option
 - c7.2.5 report the findings of your investigation to your customer and offer your chosen solution
 - c7.2.6 escalate the complaint by involving more senior members of your organisation or an independent third party if there is sufficient reason to do so
 - c7.2.7 give feedback to other colleagues involved which will help them avoid future complaints
 - c7.2.8 keep clear records of the way the complaint has been handled to avoid later misunderstandings

Knowledge and understanding

To be competent in processing customer service complaints you need to know and understand:

- c7a) how to monitor the level of complaints and identify those that should provoke a special review of the service offer and service delivery
- c7b) why dealing with complaints is an inevitable part of delivering customer service
- c7c) organisational procedures for dealing with complaints
- c7d) how to negotiate a solution with your customer that is acceptable to that customer and to the organisation
- c7e) the regulatory definition of a complaint in your sector and the regulatory requirements of how complaints should be handled and reported
- c7f) when to escalate a complaint by involving more senior members of the organisation or an independent third party
- c7g) the cost and regulatory implications of admitting liability for an error made by your organisation
- c7h) how to spot and interpret signals that your customer may be considering making a complaint
- c7i) techniques for handling conflict
- c7j) the importance of dealing with a complaint promptly
- c7k) why the offer of compensation or replacement service or products may not always be the best options for resolving a complaint
- c7l) how the successful handling of a complaint presents an opportunity to impress a customer who has been dissatisfied

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: C7 Process customer service complaints				
Element: C7.1 Recognise the signs that a query or problem is about to produce a complaint				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
C7.1.1	identify signs that a customer is becoming dissatisfied with the customer service of your organisation			
C7.1.2	take action to change the situation so that the query or problem does not result in a complaint			
C7.1.3	take action to change the situation so that the query or problem does not result in a complaint			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: C7 Process customer service complaints				
Element: C7.2 Deal with a complaint effectively				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
C7.2.1	ensure that you have a clear understanding of the nature and details of the complaint			
C7.2.2	investigate the facts of the complaint in order to establish whether it should be dealt with as a justified complaint or an unjustified complaint			
C7.2.3	identify all the possible options for a solution and consider the benefits and drawbacks of each option for your customer and for your organisation			
C7.2.4	assess the risks to your organisation of choosing each option			
C7.2.5	report the findings of your investigation to your customer and offer your chosen solution			
C7.2.6	escalate the complaint by involving more senior members of your organisation or an independent third party if there is sufficient reason to do so			
C7.2.7	give feedback to other colleagues involved which will help them avoid future complaints			

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Performance criteria: You need to show that:	<i>(Assessor to insert date each time competence is demonstrated)</i>			
C7.2.8 keep clear records of the way the complaint has been handled to avoid later misunderstandings				

Feedback/comments: 	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5									
Candidate:					Assessor:				
<p>Unit C7: Process customer service complaints</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
C7a) how to monitor the level of complaints and identify those that should provoke a special review of the service offer and service delivery									
C7b) why dealing with complaints is an inevitable part of delivering customer service									
C7c) organisational procedures for dealing with complaints									
C7d) how to negotiate a solution with your customer that is acceptable to that customer and to the organisation									
C7e) the regulatory definition of a complaint in your sector and the regulatory requirements of how complaints should be handled and reported									
C7f) when to escalate a complaint by involving more senior members of the organisation or an independent third party									

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Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
C7g) the cost and regulatory implications of admitting liability for an error made by your organisation									
C7h) how to spot and interpret signals that your customer may be considering making a complaint									
C7i) techniques for handling conflict									
C7j) the importance of dealing with a complaint promptly									
C7k) why the offer of compensation or replacement service or products may not always be the best options for resolving a complaint									
C7l) how the successful handling of a complaint presents an opportunity to impress a customer who has been dissatisfied									

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

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	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit D1: Develop customer relationships

This unit is part of the Customer Service Theme of Development and Improvement. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

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

Customer service standards

To develop customer relationships you must consistently:

- D1.1 Build your customer's confidence that the service you give will be excellent**
 - d1.1.1 show that you know and understand your organisation's services or products
 - d1.1.2 allocate the time you take to deal with your customer following organisational guidelines
 - d1.1.3 reassure your customer that you are doing everything possible to keep the service promises made by your organisation
- D1.2 Meet the expectations of your customers**
 - d1.2.1 recognise when there may be a conflict between your customer's expectations and your organisation's service offer
 - d1.2.2 balance your customer's expectations with your organisation's service offer by offering an alternative or explaining the limits of the service offer
 - d1.2.3 work effectively with others to resolve any difficulties in meeting your customer's expectations
- D1.3 Develop the long-term relationship between your customer and your organisation**
 - d1.3.1 give additional help and information to your customer in response to their questions and comments about your organisation's services or products
 - d1.3.2 discuss expectations with your customer and explain how these compare with your organisation's services or products
 - d1.3.3 advise others of feedback received from your customer

- d1.3.4 identify new ways of helping your customers based on the feedback they have given you
- d1.3.5 identify added value that your organisation could offer to long-term customers

Knowledge and understanding

To be competent at developing customer relationships you need to know and understand:

- d1a) the importance of customer retention
- d1b) how your own behaviour affects the behaviour of the customer
- d1c) how to behave assertively and professionally at all times
- d1d) how to defuse potentially stressful situations
- d1e) the limitations of your organisation's service offer
- d1f) how customer expectations may change as they deal with your organisation
- d1g) the cost and resource implications of an extension of the service offer to meet or exceed customer expectations
- d1h) the cost implications of bringing in new customers as opposed to retaining existing customers
- d1i) who to refer to when considering any variation to your organisation's service offer

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: D1 Develop customer relationships				
Element: D1.1 Build your customer's confidence that the service you give will be excellent				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
D1.1.1	show that you know and understand your organisation's services or products			
D1.1.2	allocate the time you take to deal with your customer following organisational guidelines			
D1.1.3	reassure your customer that you are doing everything possible to keep the service promises made by your organisation			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: D1 Develop customer relationships				
Element: D1.2 Meet the expectations of your customers				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
D1.2.1	recognise when there may be a conflict between your customer's expectations and your organisation's service offer			
D1.2.2	balance your customer's expectations with your organisation's service offer by offering an alternative or explaining the limits of the service offer			
D1.2.3	work effectively with others to resolve any difficulties in meeting your customer's expectations			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: D1 Develop customer relationships				
Element: D1.3 Develop the long-term relationship between your customer and your organisation				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
D1.3.1	give additional help and information to your customer in response to their questions and comments about your organisation's services or products			
D1.3.2	discuss expectations with your customer and explain how these compare with your organisation's services or products			
D1.3.3	advise others of feedback received from your customer			
D1.3.4	identify new ways of helping your customers based on the feedback they have given you			
D1.3.5	identify added value that your organisation could offer to long-term customers			

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Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5									
Candidate:					Assessor:				
<p>Unit title, D1: Develop customer relationships</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
D1a) the importance of customer retention									
D1b) how your own behaviour affects the behaviour of the customer									
D1c) how to behave assertively and professionally at all times									
D1d) how to defuse potentially stressful situations									
D1e) the limitations of your organisation's service offer									
D1f) how customer expectations may change as they deal with your organisation									
D1g) the cost and resource implications of an extension of the service offer to meet or exceed customer expectations									

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Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
D1h) the cost implications of bringing in new customers as opposed to retaining existing customers									
D1i) who to refer to when considering any variation to your organisation's service offer									

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

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Unit summary sheet

Unit D2: Support customer service improvements

This unit is part of the Customer Service Theme of Development and Improvement. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

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. Your job involves delivering customer service. If your organisation has decided to make changes, it is your job to support them and to present them positively to your customers. Also, by listening to customer comments you may have your own ideas about how the service you deliver could be improved. This unit is about how you provide support for changes that your organisation has introduced. In addition, it covers how you present your own ideas for improvements to someone in your organisation who can authorise trying out the change.

Customer service standards

To support customer service improvements you must consistently:

D2.1 Use feedback to identify potential customer service improvements

- d2.1.1 gather informal feedback from your customers
- d2.1.2 use your organisation's procedures to collect feedback from your customers
- d2.1.3 use the information from your customers to develop a better understanding of their customer service experience
- d2.1.4 identify ways the service you give could be improved based on information you have gathered
- d2.1.5 share your ideas for improving customer service with colleagues

D2.2 Implement changes in customer service

- d2.2.1 identify a possible change that could be made to improve customer service
- d2.2.2 present your idea for improving customer service to a colleague with the appropriate authority to approve the change
- d2.2.3 carry out changes to customer service procedures based on your own idea or proposed by your organisation
- d2.2.4 keep your customers informed of changes to customer service
- d2.2.5 give customers a positive impression of changes that have been made
- d2.2.6 work positively with others to support customer service changes

D2.3 Assist with the evaluation of changes in customer service

- d2.3.1 discuss with others how changes to customer service are working
- d2.3.2 work with others to identify any negative effects of changes and how these can be avoided

Knowledge and understanding

To be competent at supporting customer service improvements you need to know and understand:

- d2a) how customer experience is influenced by the way service is delivered
- d2b) how customer feedback is obtained
- d2c) how to work with others to identify and support change in the way service is delivered
- d2d) why it is important to give a positive impression to your customer about the changes made by your organisation even if you disagree with them

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: D2 Support customer service improvements				
Element: D2.1 Use feedback to identify potential customer service improvements				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
D2.1.1	gather informal feedback from your customers			
D2.1.2	use your organisation's procedures to collect feedback from your customers			
D2.1.3	use the information from your customers to develop a better understanding of their customer service experience			
D2.1.4	identify ways the service you give could be improved based on information you have gathered			
D2.1.5	share your ideas for improving customer service with colleagues			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: D2 Support customer service improvements				
Element: D2.2 Implement changes in customer service				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
D2.2.1	identify a possible change that could be made to improve customer service			
D2.2.2	present your idea for improving customer service to a colleague with the appropriate authority to approve the change			
D2.2.3	carry out changes to customer service procedures based on your own idea or proposed by your organisation			
D2.2.4	keep your customers informed of changes to customer service			
D2.2.5	give customers a positive impression of changes that have been made			
D2.2.6	work positively with others to support customer service changes			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: D2 Support customer service improvements				
Element: D2.3 Assist with the evaluation of changes in customer service				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
D2.3.1	discuss with others how changes to customer service are working			
D2.3.2	work with others to identify any negative effects of changes and how these can be avoided			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5									
Candidate:					Assessor:				
<p>Unit D2: Support customer service improvements</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
D2a) how customer experience is influenced by the way service is delivered									
D2b) how customer feedback is obtained									
D2c) how to work with others to identify and support change in the way service is delivered									
D2d) why it is important to give a positive impression to your customer about the changes made by your organisation even if you disagree with them									

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Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
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	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit D3: Develop personal performance through delivering customer service

This unit is part of the Customer Service Theme of Development and Improvement. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

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

Customer service standards

To develop personal performance through delivering customer service you must consistently:

D3.1 Review performance in your customer service role

- d3.1.1 work with an appropriate person to establish what you need to know, understand and be able to do to work effectively in your customer service role
- d3.1.2 identify and review situations from your own positive and negative experiences as a customer
- d3.1.3 carry out a self assessment of your performance in your customer service role and identify your strengths, weaknesses and development needs

D3.2 Prepare a personal development plan and keep it up to date

- d3.2.1 agree your strengths, weaknesses and development needs with an appropriate person
- d3.2.2 work with an appropriate person to draw up your own development objectives to improve your performance in your customer service role
- d3.2.3 develop a customer service personal development plan
- d3.2.4 regularly review your progress towards your objectives with an appropriate person

D3.3 Undertake development activities and obtain feedback on your customer service performance

- d3.3.1 complete development activities identified in your customer service personal development plan
- d3.3.2 use your day to day experiences with your customers and your own experiences as a customer to develop your customer service performance

d3.3.3 obtain feedback from an appropriate person about your customer service performance

d3.3.4 review and update your customer service personal development plan

Knowledge and understanding

To be competent at developing your personal performance through delivering customer service you need to know and understand:

- d3a) your organisation's systems and procedures for developing personal performance in customer service
- d3b) how your behaviour has an effect on the behaviour of others
- d3c) how effective learning depends on a process of planning, doing and reviewing
- d3d) how to review effectively your personal strengths and development needs
- d3e) how to put together a personal development plan that will build on your strengths and overcome your weaknesses in areas that are important to customer service
- d3f) how to access sources of information and support for your learning
- d3g) how to obtain useful and constructive personal feedback from others
- d3h) how to respond positively to personal feedback

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: D3 Develop personal performance through delivering customer service				
Element: D3.1 Review performance in your customer service role				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
D3.1.1	work with an appropriate person to establish what you need to know, understand and be able to do to work effectively in your customer service role			
D3.1.2	identify and review situations from your own positive and negative experiences as a customer			
D3.1.3	carry out a self assessment of your performance in your customer service role and identify your strengths, weaknesses and development needs			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: D3 Develop personal performance through delivering customer service				
Element: D3.2 Prepare a personal development plan and keep it up to date				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
D3.2.1	agree your strengths, weaknesses and development needs with an appropriate person			
D3.2.2	work with an appropriate person to draw up your own development objectives to improve your performance in your customer service role			
D3.2.3	develop a customer service personal development plan			
D3.2.4	regularly review your progress towards your objectives with an appropriate person			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: D3 Develop personal performance through delivering customer service				
Element: D3.3 Undertake development activities and obtain feedback on your customer service performance				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
D3.3.1	complete development activities identified in your customer service personal development plan			
D3.3.2	use your day to day experiences with your customers and your own experiences as a customer to develop your customer service performance			
D3.3.3	obtain feedback from an appropriate person about your customer service performance			
D3.3.4	review and update your customer service personal development plan			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5									
Candidate:					Assessor:				
<p>Unit D3: Develop personal performance through delivering customer service</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
D3a) your organisation's systems and procedures for developing personal performance in customer service									
D3b) how your behaviour has an effect on the behaviour of others									
D3c) how effective learning depends on process of planning, doing and reviewing									
D3d) how to review effectively your personal strengths and development needs									
D3e) how to put together a personal development plan that will build on your strengths and overcome your weaknesses in areas that are important to customer service									
D3f) how to access sources of information and support for your learning									

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Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
D3g) how to obtain useful and constructive personal feedback from others									
D3h) how to respond positively to personal feedback									

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit D4: Support customers using on-line customer services

This unit is part of the Customer Service Theme of Development and Improvement. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

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 you in understanding what they are 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 your customer is unable to discover how it can deliver what they want. This unit is for you if one part of your job involves helping customers to find their way through on-line systems.

Customer service standard

When you support customers using on-line services you must consistently:

D4.1 Establish the type and level of support your customer needs to achieve on-line customer service

- d4.1.1 ensure that you are completely familiar and up-to-date and with the on-line services that your customers use
- d4.1.2 listen carefully to what your customer is trying to achieve
- d4.1.3 listen carefully to what your customer is having difficulties with
- d4.1.4 question your customer to discover their degree of familiarity with the system
- d4.1.5 offer your customer the option of trying the on-line approach once more
- d4.1.6 agree with your customer the exact nature of their problem and steps that may be taken to overcome it

D4.2 Support on-line customer service in conversation with your customer

- d4.2.1 explore the on-line customer system in order to develop your own knowledge and skills in its use
- d4.2.2 step through the screen sequence with your customer whilst allowing them to operate the system for themselves
- d4.2.3 address your customer in an understanding and supportive manner
- d4.2.4 explain to your customer why certain steps are required in the process
- d4.2.5 offer the options to your customer of stepping them through the process or completing the transaction yourself
- d4.2.6 promote access to additional services or products when supporting customers on-line

Knowledge and understanding

To be competent at supporting customers using on-line services you must know and understand:

- d4a) how your organisation's system for on-line service delivery works
- d4b) the importance of close active listening to discover what your customer is trying to achieve
- d4c) ways to communicate clearly with customers who have different levels of skills and understanding of the on-line system
- d4d) why it is generally preferable for your customer to complete a transaction for themselves
- d4e) the importance of building customer confidence in using the on-line system by supporting and encouraging
- d4f) the benefits and drawbacks of talking a customer through use of the system or completing the transaction yourself
- d4g) additional services or products that may be promoted to on-line customers

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: D4 Support customers using on-line customer services				
Element: D4.1 Establish the type and level of support your customer needs to achieve on-line customer service				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
D4.1.1	ensure that you are completely familiar and up-to-date and with the on-line services that your customers use			
D4.1.2	listen carefully to what your customer is trying to achieve			
D4.1.3	listen carefully to what your customer is having difficulties with			
D4.1.4	question your customer to discover their degree of familiarity with the system			
D4.1.5	offer your customer the option of trying the on-line approach once more			
D4.1.6	agree with your customer the exact nature of their problem and steps that may be taken to overcome it			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: D4 Support customers using on-line customer services				
Element: D4.2 Support on-line customer service in conversation with your customer				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
D4.2.1	explore the on-line customer system in order to develop your own knowledge and skills in its use			
D4.2.2	step through the screen sequence with your customer whilst allowing them to operate the system for themselves			
D4.2.3	address your customer in an understanding and supportive manner			
D4.2.4	explain to your customer why certain steps are required in the process			
D4.2.5	offer the options to your customer of stepping them through the process or completing the transaction yourself			
D4.2.6	promote access to additional services or products when supporting customers on-line			

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Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit D4: Support customers using on-line customer services</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
D4a)	how your organisation's system for on-line service delivery works									
D4b)	the importance of close active listening to discover what your customer is trying to achieve									
D4c)	ways to communicate clearly with customers who have different levels of skills and understanding of the on-line system									
D4d)	why it is generally preferable for your customer to complete a transaction for themselves									
D4e)	the importance of building customer confidence in using the on-line system by supporting and encouraging									
D4f)	the benefits and drawbacks of talking a customer through use of the system or completing the transaction yourself									

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Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
D4g) additional services or products that may be promoted to on-line customers									

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit D5: Buddy a colleague to develop their customer service skills

This unit is part of the Customer Service Theme of Development and Improvement. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

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 you are asked to buddy a colleague who is learning customer service aspects of their job, you need to approach that responsibility in an organised way. This unit is about how to be a good buddy by working alongside your colleague and providing them with constructive feedback and support. You do not need to be more senior than your colleague or their supervisor to act as a customer service buddy.

Customer service standard

When you buddy a colleague to develop their customer service skills you must consistently:

D5.1 Plan and prepare to buddy a colleague

- d5.1.1 agree with your colleague aspects of their work which may benefit most from your buddying support
- d5.1.2 confirm your understanding of your colleague's job tasks and responsibilities using reliable sources
- d5.1.3 clarify the customer service image and impression your colleague should present in their job
- d5.1.4 arrange times when it will be most helpful to work alongside your colleague
- d5.1.5 plan details of a buddy session to support your colleague on the job

D5.2 Support your buddy colleague on the job

- d5.2.1 agree with your colleague where you will be placed near them when buddying them on the job
- d5.2.2 ensure your presence when your buddy is dealing with customers does not detract from effective customer service
- d5.2.3 carry out customer service tasks in the presence of your buddy colleague to set an example they can follow
- d5.2.4 observe your colleague closely to identify what they do well and areas in which they could improve
- d5.2.5 discuss each customer transaction briefly when there is time available between dealing with customers to identify approaches that work well and areas for improvement
- d5.2.6 praise your colleague on aspects of their work which they have carried out well

- d5.2.7 explain to your colleague ways in which they can improve their customer service performance
- d5.2.8 make notes on your colleague's strengths and areas for development that you can discuss with them
- D5.3 Provide buddy support off the job**
- d5.3.1 arrange suitable times to meet with your buddy colleague when they are not directly engaged with customers
- d5.3.2 identify areas of general interest that help to establish rapport with your buddy colleague
- d5.3.3 use notes made when observing your colleague to discuss positive and negative aspects of their performance
- d5.3.4 agree actions your buddy colleague can take to improve their customer service performance
- d5.3.5 offer hints and tips on effective customer service actions to your buddy colleague drawn from your own experience

Knowledge and understanding

To be competent at buddying a colleague to develop their customer service skills you must know and understand:

- d5a) the tasks in your buddy colleague's job
- d5b) areas of the job that benefit most from buddying support
- d5c) the customer service image and impression that should be presented in your buddy colleague's job
- d5d) the best times at which to work alongside your buddy colleague
- d5e) ways to work alongside your buddy colleague without intruding on the customer relationship
- d5f) techniques for giving positive feedback and constructive criticism to your buddy colleague
- d5g) the importance of establishing an effective rapport with your buddy colleague
- d5h) options for actions your buddy colleague can take to improve their customer service performance

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: D5 Buddy a colleague to develop their customer service skills				
Element: D5.1 Plan and prepare to buddy a colleague				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
D5.1.1	agree with your colleague aspects of their work which may benefit most from your buddying support			
D5.1.2	confirm your understanding of your colleague's job tasks and responsibilities using reliable sources			
D5.1.3	clarify the customer service image and impression your colleague should present in their job			
D5.1.4	arrange times when it will be most helpful to work alongside your colleague			
D5.1.5	plan details of a buddy session to support your colleague on the job			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: D5 Buddy a colleague to develop their customer service skills				
Element: D5.2 Support your buddy colleague on the job				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
D5.2.1	agree with your colleague where you will be placed near them when buddying them on the job			
D5.2.2	ensure your presence when your buddy is dealing with customers does not detract from effective customer service			
D5.2.3	carry out customer service tasks in the presence of your buddy colleague to set an example they can follow			
D5.2.4	observe your colleague closely to identify what they do well and areas in which they could improve			
D5.2.5	discuss each customer transaction briefly when there is time available between dealing with customers to identify approaches that work well and areas for improvement			
D5.2.6	praise your colleague on aspects of their work which they have carried out well			
D5.2.7	explain to your colleague ways in which they can improve their customer service performance			
D5.2.8	make notes on your colleague's strengths and areas for development that you can discuss with them			

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Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: D5 Buddy a colleague to develop their customer service skills				
Element: D5.3 Provide buddy support off the job				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
D5.3.1	arrange suitable times to meet with your buddy colleague when they are not directly engaged with customers			
D5.3.2	identify areas of general interest that help to establish rapport with your buddy colleague			
D5.3.3	use notes made when observing your colleague to discuss positive and negative aspects of their performance			
D5.3.4	agree actions your buddy colleague can take to improve their customer service performance			
D5.3.5	offer hints and tips on effective customer service actions to your buddy colleague drawn from your own experience			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5									
Candidate:					Assessor:				
<p>Unit D5: Buddy a colleague to develop their customer service skills</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
D5a) the tasks in your buddy colleague's job									
D5b) areas of the job that benefit most from buddying support									
D5c) the customer service image and impression that should be presented in your buddy colleague's job									
D5d) the best times at which to work alongside your buddy colleague									
D5e) ways to work alongside your buddy colleague without intruding on the customer relationship									
D5f) techniques for giving positive feedback and constructive criticism to your buddy colleague									
D5g) the importance of establishing an effective rapport with your buddy colleague									

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Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
D5h) options for actions your buddy colleague can take to improve their customer service performance									

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

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	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit D6: Develop your own customer service skills through self-study

This unit is part of the Customer Service Theme of Development and Improvement. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

Much of the responsibility for developing customer service knowledge and skills rests on you as an individual. There are numerous sources of information that can be used but which need to be located and linked with your 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 you learn in the course of your work. It is the right unit for you if you need to take responsibility for your own self-development in relation to customer service skills.

Customer service standard

When you develop your own customer service skills through self-study you must consistently:

D6.1 Find ways to learn more about customer service and your job

- D6.1.1 identify different sources of information and support that will help you to develop your customer service knowledge and skills
- D6.1.2 agree with your line manager, your mentor or others doing a similar job the best sources to use for self-development of your customer service knowledge and skills
- D6.1.3 take action to remind yourself to check on sources of information and support
- D6.1.4 search for additional sources of information to support your customer service learning
- D6.1.5 store materials that support self-study for future use
- D6.1.6 plan time to study the self-study materials you have collected

D6.2 Use sources of self-development to extend your customer service skills and knowledge

- D6.2.1 access organisational update information to extend your knowledge of products and services
- D6.2.3 access organisational information to learn more about the way your role contributes to customer service
- D6.2.4 monitor publications to identify ideas and new developments in customer service which you could apply in your work
- D6.2.5 study collected information to develop your own customer service knowledge and skills
- D6.2.6 take action resulting from your learning to change the way you deal with customers

- D6.2.7 share your plans for action with your line manager, your mentor or others doing a similar job to seek their ideas for further options
- D6.2.8 record actions you take to learn more about customer service and identify those which have the most positive effects

Knowledge and understanding

To be competent at developing your own customer service skills through self-study you must know and understand:

- D6a) ways to locate information updating you on services and products in your information
- D6b) sources of information about customer service knowledge and skills that will help you to develop
- D6c) ways to store information that you use to develop your customer service skills
- D6d) the importance of focus when self-studying to improve your customer service knowledge and skills
- D6e) ways to convert information or ideas you have found through self-study into practical customer service actions
- D6f) the value of discussing your learning with line manager, your mentor or others doing a similar job
- D6g) methods of recording actions to improve your customer service skills which have had positive effects

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: D6 Develop your own customer service skills through self-study				
Element: D6.1 Find ways to learn more about customer service and your job				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
D6.1.1	identify different sources of information and support that will help you to develop your customer service knowledge and skills			
D6.1.2	agree with your line manager, your mentor or others doing a similar job the best sources to use for self-development of your customer service knowledge and skills			
D6.1.3	take action to remind yourself to check on sources of information and support			
D6.1.4	search for additional sources of information to support your customer service learning			
D6.1.5	store materials that support self-study for future use			
D6.1.6	plan time to study the self-study materials you have collected			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: D6 Develop your own customer service skills through self-study				
Element: D6.2 Use sources of self-development to extend your customer service skills and knowledge				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
D6.2.1	access organisational update information to extend your knowledge of products and services			
D6.2.2	omitted from NOS			
D6.2.3	access organisational information to learn more about the way your role contributes to customer service			
D6.2.4	monitor publications to identify ideas and new developments in customer service which you could apply in your work			
D6.2.5	study collected information to develop your own customer service knowledge and skills			
D6.2.6	take action resulting from your learning to change the way you deal with customers			
D6.2.7	share your plans for action with your line manager, your mentor or others doing a similar job to seek their ideas for further options			
D6.2.8	record actions you take to learn more about customer service and identify those which have the most positive effects			

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Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5										
Candidate:					Assessor:					
<p>Unit D6: Develop your own customer service skills through self-study</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:		Type of evidence								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
D6a)	ways to locate information updating you on services and products in your information									
D6b)	sources of information about customer service knowledge and skills that will help you to develop									
D6c)	ways to store information that you use to develop your customer service skills									
D6d)	the importance of focus when self-studying to improve your customer service knowledge and skills									
D6e)	ways to convert information or ideas you have found through self-study into practical customer service actions									
D6f)	the value of discussing your learning with line manager, your mentor or others doing a similar job									

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Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
D6g) methods of recording actions to improve your customer service skills which have had positive effects									

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
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Unit summary sheet

Unit D7: Support customers using self-service technology

This unit is part of the Customer Service Theme of Development and Improvement. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What this unit is about

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, you must be able to recognise what help and intervention is needed and to provide that in a way that pleases your customer and builds their confidence in the use of the equipment. This unit is right for you if any part of your job involves helping and encouraging customers to operate self-service equipment in order to improve their customer experience.

Customer service standard

When you support customers using self-service technology you must consistently:

- D7.1 Identify the type of help needed by a customer using self-service technology**
 - d7.1.1 prepare a standard demonstration of using the self-service equipment
 - d7.1.2 prepare to answer frequently asked questions about the operation of the self-service equipment
 - d7.1.3 identify signs of when a customer is having difficulty with the self service equipment
 - d7.1.4 choose an appropriate style and level of intervention to help a customer who is having trouble using the self-service equipment
- D7.2 Assist a customer using self-service technology**
 - d7.2.1 maintain a professional, polite and approachable manner while you observe customers using self-help technology
 - d7.2.2 demonstrate use of the self-service equipment to a customer
 - d7.2.3 respond to a request for help from a customer using self-help equipment
 - d7.2.4 make use of staff override options to clear self-service equipment for use by customers
 - d7.2.5 talk a customer through use of the self-service equipment whilst allowing them to operate it
 - d7.2.6 invite a customer to repeat the operation of the self-service equipment if that helps them to learn
 - d7.2.7 make positive and encouraging comments to a customer who is learning to use the self-service equipment

- d7.2.8 explain to your customer why certain actions and steps are needed to operate self service equipment
- d7.2.9 troubleshoot problems with self-service equipment and report errors and issues to appropriate people

Knowledge and understanding

To be competent at supporting customers using self-service technology you must know and understand:

- d7a) reasons why your organisation chooses to offer customers self-service equipment
- d7b) all aspects of normal operation of the customer self-service equipment
- d7c) frequently asked questions about operation of the self-service equipment and effective answers to those questions
- d7d) techniques for giving an effective demonstration of self-service equipment
- d7e) signals and signs that a customer needs help with self-service equipment
- d7f) organisational procedures for using staff intervention to clear self-service equipment
- d7g) the importance of building customer confidence in using self-service equipment
- d7h) organisational procedures for dealing with self-service equipment problems

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: D7 Support customers using self-service technology				
Element: D7.1 Identify the type of help needed by a customer using self-service technology				
Performance criteria: You need to show that:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
D7.1.1	prepare a standard demonstration of using the self-service equipment			
D7.1.2	prepare to answer frequently asked questions about the operation of the self-service equipment			
D7.1.3	identify signs of when a customer is having difficulty with the self service equipment			
D7.1.4	choose an appropriate style and level of intervention to help a customer who is having trouble using the self-service equipment			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5				
Candidate:				
Assessor:				
Unit title: D7 Support customers using self-service technology				
Element: D7.2 Assist a customer using self-service technology				
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
D7.2.1	maintain a professional, polite and approachable manner while you observe customers using self-help technology			
D7.2.2	demonstrate use of the self-service equipment to a customer			
D7.2.3	respond to a request for help from a customer using self-help equipment			
D7.2.4	make use of staff override options to clear self-service equipment for use by customers			
D7.2.5	talk a customer through use of the self-service equipment whilst allowing them to operate it			
D7.2.6	invite a customer to repeat the operation of the self-service equipment if that helps them to learn			
D7.2.7	make positive and encouraging comments to a customer who is learning to use the self-service equipment			
D7.2.8	explain to your customer why certain actions and steps are needed to operate self service equipment			

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Performance criteria: You need to show that:	<i>(Assessor to insert date each time competence is demonstrated)</i>			
D7.2.9 troubleshoot problems with self-service equipment and report errors and issues to appropriate people				

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

SVQ title and level: SVQ2 in Customer Service at SCQF level 5									
Candidate:					Assessor:				
<p>Unit D7: Support customers using self-service technology</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
D7a) reasons why your organisation chooses to offer customers self-service equipment									
D7b) all aspects of normal operation of the customer self-service equipment									
D7c) frequently asked questions about operation of the self-service equipment and effective answers to those questions									
D7d) techniques for giving an effective demonstration of self-service equipment									
D7e) signals and signs that a customer needs help with self-service equipment									
D7f) organisational procedures for using staff intervention to clear self-service equipment									
D7g) the importance of building customer confidence in using self-service equipment									

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Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
D7h) organisational procedures for dealing with self-service equipment problems									

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Glossary

This section provides explanations and definitions of the key words used in this SVQ. In occupational standards it is quite common to find words or phrases used which you will be familiar with, but which, in the detail of the standards, may be used in a very particular way. **Therefore, we would encourage you to read this section carefully before you begin working with the standards and to refer back to this section as required.**

Assessment	the process of generating and collecting evidence of a candidate's performance and judging that evidence against defined criteria
Assessor	the person designated in a centre to be responsible for collecting evidence of candidates' competence, judging it and recording achievement
Authentication	the process by which an advisor or assessor confirms that an assessment has been undertaken by a candidate and that all regulations governing the assessment have been observed
Candidate	the person enrolling for an SVQ qualification
Centre	the college, training organisation school or workplace where SVQ qualifications are delivered and assessed
Customer service promise	what the customer can expect through buying a product or service - this may be defined through branding or promotion
Element of competence	statements which define the products of learning. The statements describe the activities the candidate needs to perform in order to achieve the unit. They contain achievement criteria and sometimes statements on evidence of achievement and evidence
Evidence	materials the candidate has to provide as proof of his or her competence against specified achievement criteria
Evidence requirements	specify the evidence that must be gathered to show that the candidate has met the standards laid down in the achievement criteria
External customer	people outside the organisation which is providing the products or services
External verifier	the person appointed by Edexcel who is responsible for the quality assurance of a centre's provision. An external verifier is often appointed on a subject area basis or for cognate groups of units
Instrument of assessment	a means of generating evidence of the candidate's performance

Internal customer	employees or departments within the organisation who depend on other employees or departments for products or services eg colleagues, supervisors, other staff teams or departments, suppliers
Internal verifier	the person appointed from within the centre who ensures that assessors apply the standards uniformly and consistently
Mentor	a person who carries out, either singly or in combination, the functions of advising a candidate, collecting evidence of his or her competence on behalf of the assessor and authenticating the work candidates have undertaken. A mentor might also provide witness testimony
Observation	a means of assessment in which the candidate is observed carrying out tasks that reflect the performance criteria
Performance criteria	statements which describe the standard to which candidates must perform the activities
Portfolio	a compilation of evidence which can form the basis for assessment. The portfolio is commonly used in SVQ awards and in alternative routes to assessment such as APL and credit transfer
Product evaluation	a means of assessment which enables the quality of a product produced by the candidate, rather than the process of producing it, to be evaluated
Service partner	an internal department or external organisation which is necessary in order to deliver customer service, eg suppliers
Service offer	the type of service that customers can expect to receive from an organisation, often related to branding or promotion
Service chain	a series of internal departments or external organisations which rely on each other to deliver customer service, eg supply of resources, administrative services.

