SVQ 3 in Customer Service at SCQF Level 6

Scottish Vocational Qualifications

Specification

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Issue 2

Edexcel, BTEC and LCCI qualifications

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Contents

Purpose of this specification

This specification sets out:

- the type of qualification

- the objectives of the qualification

- any other qualifications that a candidate must have completed before taking the qualification

- any prior knowledge, skills or understanding which the candidate is required to have before taking the qualification

- the combination of units that a candidate must have completed before the qualification will be awarded and any pathways

- methods of assessment

- conditions of assessment including: the knowledge, skills and understanding that will be assessed as part of the qualification

- the criteria against which a candidate's level of attainment will be measured (such as assessment criteria)

- resources required, including roles, responsibilities and requirements, technical and physical

- evidence requirements

- assessment principles or requirements for the qualification, for example assessment strategies, assessment principles/requirements or any other appropriate guidelines

- assessment requirements/strategy as published by the relevant Sector Skills Council/Standards Setting Body

- the Modern Apprenticeship framework in which the qualification is included, where appropriate.

1   Introducing Edexcel Scottish Vocational Qualifications

What are Scottish Vocational Qualifications?

Scottish Vocational Qualifications (SVQs) are work-based qualifications that give candidates the opportunity to develop and demonstrate their competence in the area of work or job role to which a particular qualification relates.

SVQs are based on the National Occupational Standards (NOS) for the appropriate sector. NOS define what employees, or potential employees, must be able to do and know, and how well they should undertake work tasks and work roles.

At SVQ Level 2 and above SVQs are recognised as the competence component of Modern/Technical/Professional Apprenticeship frameworks. Qualifications at SVQ Level 1 can be used in traineeships, which are stepping stones to apprenticeship qualifications.

For those who wish to take a work-based qualification, SVQs can be delivered as stand-alone qualifications outside of apprenticeship frameworks.

SVQs allow flexible delivery that meets the individual candidate's needs. They are suitable for those in employment and for those who are studying at college and have a part-time job or access to a substantial work placement in order to demonstrate the competencies required for work.

Most candidates will work towards their qualification in the workplace or in settings that replicate the working environment as specified in the assessment requirements/strategy for the sector. Colleges, training centres and/or employers can offer these qualifications provided they have access to appropriate physical and human resources.

2   Explanation of levels

SVQs are available at five levels, reflecting the range and depth of skills, knowledge and experience that employees should have as they progress in their industry.

SVQ LEVEL	Explanation of level
Level 1	At SVQ Level 1 (Scottish Credit and Qualifications Framework (SCQF) Level 4), competence involves the application of knowledge and skills in the performance of a range of work tasks, most of which fall into a set pattern and do not change.
Level 2	At SVQ Level 2 (SCQF Level 5), candidates have to be able to show competence in a range of varied activities, in a variety of contexts. Some of the activities will be complex and they will be working in a job where they have individual responsibility or autonomy. The job may also involve collaboration with others, perhaps through membership of a work group or team.
Level 3	At SVQ Level 3 (either SCQF Level 6 or 7), candidates have to perform a broad range of activities in a variety of contexts, most of which are complex and non-routine. Candidates will usually be working with considerable responsibility and autonomy and may have supervisory or managerial responsibilities.
Level 4	At SVQ Level 4 (either SCQF Level 8 or 9), candidates need to show competence in a broad range of complex, technical or professional work activities. Activities will be performed in a wide variety of contexts and with a substantial degree of personal responsibility and autonomy. Candidates will often be responsible for the work of others and for allocating resources.
Level 5	At SVQ Level 5 (SCQF Level 11), candidates have to demonstrate competence in applying fundamental principles and complex techniques across a wide and often unpredictable variety of contexts. They will have substantial personal autonomy and often significant responsibility for the work of others, and for the allocation of substantial resources. Personal accountability for analysis and diagnosis, design, planning, execution and evaluation also feature strongly.

3 Qualification summary and key information

Qualification title	SVQ 3 in Customer Service at SCQF Level 6
Operational start date	01/01/2016
Minimum age	16
	Please note that sector-specific requirements or regulations may prevent candidates of a particular age from embarking on this qualification. Please refer to the assessment requirements/strategy.
Number of required units	7
Credit points	Minimum 36; Maximum 55
Assessment	Portfolio of evidence (internal assessment).
Grading information	The qualification and units are graded pass/fail.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before candidates register for this qualification. However, it is likely that they will be seeking work within the customer service sector, or they may already be employed in a cross-sector role or function. Centres must follow the Pearson Access and Recruitment Policy (see Section 8, Access and Recruitment).
Funding	Details of funding approval are available from Skills Development Scotland at: www.skillsdevelopmentscotland.co.uk
	and
	the Scottish Funding Council at:
	www.sfc.ac.uk
	Information is also available on the Scottish Qualifications Authority (SQA) website: www.sqa.org.uk

The qualification title, unit titles and qualification code will appear on each candidate's final certificate. Centres should tell candidates this when recruiting them and registering them with Pearson. There is more information on certification in our *UK Information Manual,* available on our website, qualifications.pearson.com

4   Qualification rationale

Qualification objectives

The SVQ 3 in Customer Service at SCQF Level 6 is for candidates who work in or who want to work in customer service roles such as.

- Customer Service Supervisor
- Customer Relationship Manager
- Customer Service Team Leader
- Client Services Officer
- Events Coordinator.

The qualification gives candidates the opportunity to:

- develop and demonstrate competence in in the job roles stated above. This includes the principles, and techniques for organising and delivering customer service, building and maintaining relationships with customers and an understanding of the legislation and regulations that governs the industry

- develop and demonstrate a range of technical skills and behaviours that supports competence in the job roles stated above. This includes resolving customer problems and complaints, communicating with customers, delivering non-routine customer service and supporting improvements in customer service

- have existing skills and knowledge recognised

- achieve a nationally-recognised SCQF Level 6 qualification

- develop personal growth and engagement in learning.

Relationship with previous qualifications

This qualification is a direct replacement for the SVQ 3 in Customer Service at SCQF Level 6, which has been updated to include the 2013 National Occupational Standards.

Apprenticeships

Skills CFA include the SVQ 3 in Customer Service at SCQF Level 6 as the mandatory component for the Modern Apprenticeship in Customer Service.

Progression opportunities

Candidates who achieve the SVQ 3 in Customer Service at SCQF Level 6 can progress to the SVQ 4 in Customer Service at SCQF Level 8. Alternatively, candidates could choose to progress to management qualifications at SCQF Level 9, including:

● SVQ 4 in Management at SCQF Level 9.

Achieving this qualification also gives candidates the opportunity to progress to job roles that require a more complex set of skills and responsibility, including leading and managing, for example Service Delivery Manager, Client Services Manager or Customer Operations Manager.

Industry support and recognition

This qualification is supported by Skills CFA, the Standards Setting Body for pan-sector business skills, which includes the customer service.

Relationship with National Occupational Standards

This qualification is based on the National Occupational Standards (NOS) in Customer Service, which were set and designed by Skills CFA.

5 Qualification structure

SVQ 3 in Customer Service at SCQF Level 6

The candidate will need to meet the requirements outlined in the table below before the qualification can be awarded.

Minimum number of units that must be completed	7
Number of mandatory units that must be completed	2
Number of optional units that must be achieved One optional unit must be selected from each of Groups B, C, D and E A further unit can be selected from any of Groups, B, C, D and E A maximum of two optional units can be selected at SCQF level 7 and/or level 8	5

Unit	SQA unit code	Mandatory units	Credit points	SCQF Level
1	CFACSF3	Show Understanding of Customer Service	6	7
2	CFACSF4	Show Understanding of the Rules that Impact on Improvements in Customer Service	6	6
Unit	**SQA unit code**	**Optional units – Group B** **Impression and image**	**Credit points**	**SCQF Level**
3	CFACSA13	Deal with Customers in Writing or Electronically	6	6
4	CFACSA14	Use Customer Service as a Competitive Tool	8	7
5	CFACSA15	Organise the Promotion of Additional Services or Products to Customers	7	6
6	CFACSA16	Build a Customer Service Knowledge Base	7	7

Unit	SQA unit code	Optional units – Group C Delivery	Credit points	SCQF Level
7	CFACSB9	Deliver Customer Service using Service Partnerships	6	6
8	CFACSB10	Organise the Delivery of Reliable Customer Service	6	6
9	CFACSB11	Improve Customer Relationship	7	6
10	CFACSB17	Deliver Customer Service in an Environmentally Friendly and Sustainable Way	3	5

Unit	SQA unit code	Optional units – Group D Handling problems	Credit points	SCQF Level
11	CFACSC5	Monitor and Solve Customer Service Problems	6	6
12	CFACSC6	Apply Risk Assessment to Customer Service	10	7
13	CFACSC7	Process Customer Service Complaints	6	7

Unit	SQA unit code	Optional units – Group E Development and improvement	Credit points	SCQF Level
14	CFACSD8	Work with Others to Improve Customer Service	8	6
15	CFACSD9	Promote Continuous Improvement	7	7
16	CFACSD10	Develop Your Own and Others' Customer Service Skills	8	6
17	CFACSD11	Lead a Team to Improve Customer Service	7	7
18	CFACSD12	Gather, Analyse and Interpret Customer Feedback	10	7
19	CFACSD13	Monitor the Quality of Customer Service Transactions	7	6
20	CFACSD14	Implement Quality Improvements to Customer Service	10	8
21	CFACSD15	Plan and Organise the Development of Customer Service Staff	9	8
22	CFACSD16	Develop a Customer Service Strategy for a Part of an Organisation	11	8

Unit	SQA unit code	Optional units – Group E Development and improvement	Credit points	SCQF Level
23	CFACSD17	Manage a Customer Service Award Programme	7	8
24	CFACSD18	Apply Technology or Other Resources to Improve Customer Service	11	8
25	CFACSD19	Review and Re-Engineer Customer Service Processes	11	8
26	CFACSD20	Manage Customer Service Performance	7	7
27	CFACSD21	Analyse and Report on the Content of Customer Service Feedback Posted on Social Media	4	6
28	CFACSD22	Develop a Customer Service Network through Social Media Platforms	5	7

Centres should be aware that within the SCQF Level 6 qualification in this specification, candidates will be required to meet the demands of unit(s) at SCQF Level 7. Centres are advised to consider the support, guidance and opportunities they give to candidates to meet the demands of the higher-level units.

6 Programme delivery

Centres are free to offer these qualifications using any mode of delivery (for example full-time, part-time, evening only, distance learning) that meets candidates' needs. Candidates must be in employment or working with a training provider on a work programme or placement so that they can develop and demonstrate the occupational competence required.

Whichever mode of delivery is used, centres must make sure that candidates have access to specified resources and to the sector specialists delivering and assessing the units. Centres must adhere to the Pearson policies that apply to the different modes of delivery. Our policy on *Collaborative arrangements for the delivery of vocational qualifications* can be found on our website, qualifications.pearson.com

There are various approaches to delivering a successful competence-based qualification. The section below outlines elements of good practice that centres can adopt in relation to candidate recruitment, preparation and support, training and assessment delivery, and employer engagement.

Elements of good practice

Candidate recruitment, preparation and support

Good practice in relation to candidate recruitment, preparation and support includes:

- providing initial advice and guidance, including work tasters, to potential candidates to give them an insight into the relevant industry and the learning programme

- using a range of appropriate and rigorous selection methods to ensure that candidates are matched to the programme best suited to their needs

- carrying out a thorough induction for candidates to ensure that they completely understand the programme and what is expected of them. For example, the induction should include the requirements of the programme, an initial assessment of current competency levels, assessment of individual learning styles, identification of training needs, an individual learning plan, details of training delivery and the assessment process. It is good practice to involve the employer in the induction process. This helps employers to understand what will be taking place during the programme and enables them to start building a relationship with the centre to support the effective delivery of the programme

- keeping in regular contact with the candidate to keep them engaged and motivated, and ensuring that there are open lines of communication between the candidate, the assessor, the employer and teaching staff.

Training and assessment delivery

Good practice in relation to training and assessment delivery includes:

- offering flexible delivery and assessment to meet the needs of the employer and candidate, through the use of a range of approaches, for example virtual learning environments (VLEs), online lectures, video, printable online resources, virtual visits, webcams for distance training, e-portfolios

- planning opportunities for the development and practising of skills on the job. On-the-job training presents an excellent opportunity to develop the candidate's routine expertise, resourcefulness, craftspersonship and business like attitude. It is, therefore, important that there is intentional structuring of practice and guidance to supplement the learning and development provided through engagement in everyday work activities. Candidates need to have structured time to learn and practise their skills separate from their everyday work activities. Teaching and learning methods, such as coaching, mentoring, shadowing, reflective practice, collaboration and consultation, could be used in this structured on-the-job learning

- developing an holistic approach to assessment by matching evidence to different assessment criteria, learning outcomes and units as appropriate, thereby reducing the assessment burden on candidates and assessors. It is good practice to draw up an assessment plan that aligns the units with the learning process and the acquisition of knowledge and skills, and which indicates how and when the units will be assessed

- discussing and agreeing with the candidate and employer suitable times, dates and work areas where assessment will take place. Candidates and employers should be given regular and relevant feedback on performance and progress.

Employer engagement

Good practice in relation to employer engagement includes:

- communicating with employers at the start of the programme to understand their business context and requirements so that the programme can be tailored to meet their needs

- working with the employer to ensure that candidates are allocated a mentor in the workplace to assist them in the day-to-day working environment and to act as a contact for the assessor/tutor

- helping the employer to better understand their role in the delivery of the programme. It is important that employers understand that sufficient and relevant work must be given to candidates in order to provide a culture of learning and to ensure that they are given every opportunity to participate in aspects of continuous professional development (CPD).

7 Centre resource requirements

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

- Centres must have the appropriate physical resources to support delivery and assessment of the qualification, for example a workplace in line with industry standards, or a realistic working environment (RWE), where permitted, as specified in the assessment strategy for the sector, equipment, IT, learning materials, teaching rooms.

- Where RWE is permitted, it must offer the same conditions as the normal, day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working.

- Centres must meet any specific human and physical resource requirements outlined in the assessment strategy in *Annexe A*. Staff assessing candidates must meet the occupational competence requirements within the overarching assessment strategy for the sector.

- There must be systems in place to ensure continuing professional development for staff delivering the qualification.

- Centres must have appropriate health and safety policies, procedures and practices in place for the delivery and assessment of the qualification.

- Centres must deliver the qualification in accordance with current equality legislation. For further details on Pearson's commitment to the Equality Act 2010, see *Section 8, Access and recruitment*. For full details on the Equality Act 2010 go to www.legislation.gov.uk or www.scotland.gov.uk

8 Access and recruitment

Our policy on access to our qualifications is that:

- they should be available to everyone who is capable of reaching the required standards

- they should be free from barriers that restrict access and progression

- there should be equal opportunities for all candidates wishing to access the qualifications.

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

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

Prior knowledge, skills and understanding

No prior knowledge, understanding, skills or qualifications are required before candidates register for this qualification, however it is likely that they will be seeking work within the customer service sector, or they may already be employed in a cross-sector role or function.

Access to qualifications for candidates with disabilities or specific needs

Equality and fairness are central to our work. Pearson's *Equality Polic*y requires all candidates to have equal opportunity to access our qualifications and assessments and that our qualifications are awarded in a way that is fair to every candidate.

We are committed to making sure that:

- candidates with a protected characteristic (as defined by the Equality Act 2010) are not, when they are undertaking one of our qualifications, disadvantaged in comparison to candidates who do not share that characteristic

- all candidates achieve the recognition they deserve from undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

For candidates with disabilities and specific needs, the assessment of their potential to achieve the qualification must identify, where appropriate, the support that will be made available to them during delivery and assessment of the qualification. For information on reasonable adjustments and special consideration, see *Section 9, Assessment*.

9 Assessment

To achieve a pass for the full qualification, the candidate must achieve all the units required in the stated qualification structure.

Language of assessment

Assessment of the internally assessed units may be in English, Welsh or Irish. If assessment is to be carried out in either Welsh or Irish then centres must inform Pearson at the point of candidate registration.

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

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

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

Internal assessment

The competence units in this qualification are assessed through an internally and externally quality assured Portfolio of evidence made up of evidence gathered during the course of the candidate's work.

Each unit has specified assessment outcomes and standards that outline the required skills and techniques and knowledge and understanding. To pass each unit the candidate must:

- achieve **all** the specified outcomes and standards
- satisfy **all** the outcomes and standards by providing consistent and valid and reliable evidence for each criterion
- prove that the evidence is their own.

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

It is important that the evidence provided to meet the performance, behaviour and knowledge outcomes and standards, is:

valid   relevant to the standards for which competence is claimed

authentic   produced by the candidate

consistent   achieved on more than one occasion

current   usually not more than two years old

sufficient   fully meets the requirements of the performance, behaviour and knowledge outcomes and standards.

Candidates can provide evidence of occupational competence from:

● **current practice** – where evidence is generated from a current job role

● a **programme of development** – where evidence comes from assessment opportunities built into a learning programme. The evidence provided must meet the requirements of the Sector Skills Council's assessment requirements/strategy

● the **Recognition of Prior Learning (RPL)** – where a candidate can demonstrate that they can meet a unit's outcomes and standards through knowledge, understanding or skills they already possess without undertaking a course of development. Candidates must submit sufficient, reliable, authentic and valid evidence for assessment. Evidence submitted that is based on RPL should give the centre confidence that the same level of skill, understanding and knowledge exists at the time of claim as existed at the time the evidence was produced. RPL is acceptable for accrediting a unit, several units, or a whole qualification

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

● a combination of these.

Assessment requirements/strategy

The assessment requirements/strategy for this qualification is included in *Annexe A*. It sets out the overarching assessment principles and the framework for assessing the units to ensure that the qualification remains valid and reliable. It has been developed by Skills CFA in partnership with employers, training providers, awarding organisations and the regulatory authorities.

Types of evidence

To achieve a unit, the candidate must gather evidence that shows that they have met the required standard specified in the assessment criteria, Pearson's quality assurance arrangements (please see *Section 11, Quality assurance of centres*) and the requirements of the assessment requirements/strategy given in *Annexe A*.

In line with the assessment requirements/strategy, evidence for internally assessed units can take a variety of forms as indicated below:

● direct observation of the candidate's performance by their assessor (O)

● outcomes from oral or written questioning (Q&A)

● products of the candidate's work (P)

● personal statements and/or reflective accounts (RA)

● professional discussion (PD)

● authentic statements/witness testimony (WT)

● expert witness testimony (EWT)

● evidence of Recognition of Prior Learning (RPL).

Candidates can use the abbreviations in their portfolios for cross-referencing purposes.

Candidates can also use pieces of evidence to prove their knowledge, skills and understanding across different outcomes and standards and/or across different units. It is not necessary for candidates to have each standard assessed separately. They should be encouraged to reference evidence to the relevant standard. However, the evidence provided for each unit must clearly reference the unit being assessed. Evidence must be available to the assessor, the internal verifier and the Pearson standards verifier.

Any specific evidence requirements for a unit are given in the *Assessment* section of the unit.

Further guidance on the requirements for centre quality assurance and internal verification processes is available on our website, qualifications.pearson.com

Appeals

Centres must have a policy for dealing with appeals from candidates. Appeals may relate to incorrect assessment decisions or unfairly conducted assessment. The first step in such a policy is a consideration of the evidence by a Lead Internal Verifier or other member of the programme team. The assessment plan should allow time for potential appeals after candidates have been given assessment decisions.

Centres must document all candidates' appeals and their resolutions. Further information on the appeals process can be found in the document *Enquiries and appeals about Pearson vocational qualifications policy,* available on our website, qualifications.pearson.com

Dealing with malpractice

Centres must have a policy for dealing with malpractice by candidates. This policy must follow the Joint Council for Qualifications (JCQ) *General and Vocational qualifications: Suspected Malpractice in Examinations and Assessments Policies and Procedures*. Centres should follow their policy in dealing with candidate malpractice. There is no need to inform Pearson of candidate malpractice unless the candidate(s) in question have been certificated or their work quality assured.

Centres must report suspected malpractice by teachers or centres to the Investigations Team at Pearson before any investigation is undertaken by the centre. Centres should provide as much information as possible on the suspected malpractice in an email to pqsmalpractice@pearson.com. It is extremely important that malpractice is reported in a timely fashion, particularly if any units have been subject to quality assurance or certification.

Reasonable adjustments to assessment

Centres are able to make adjustments to assessments to take account of the needs of individual candidates in line with the guidance given in the Pearson document *Supplementary guidance for reasonable adjustment and special consideration in vocational internally assessed units*. In most instances, adjustments can be achieved by following the guidance, for example allowing the use of assistive technology or adjusting the format of the evidence. We can advise you if you are uncertain as to whether an adjustment is fair and reasonable. Any reasonable adjustment must reflect the normal learning or working practice of a candidate in a centre or working within the occupational area.

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

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

Special consideration

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

● assessment requires the demonstration of practical competence

● criteria have to be met fully

● units/qualifications confer licence to practice.

Centres cannot apply their own special consideration; applications for special consideration must be made to Pearson and can be made only on a case-by-case basis. A separate application must be made for each candidate and certification claims must not be made until the outcome of the application has been received.

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

Both of the documents mentioned above are on our website, qualifications.pearson.com

Credit transfer

Credit transfer describes the process of using a credit or credits awarded in the context of a different qualification or awarded by a different awarding organisation towards the achievement requirements of another qualification. All awarding organisations recognise the credits awarded by all other awarding organisations that operate within the SCQF.

If candidates achieve credits with other awarding organisations, they do not need to retake any assessment for the same units. The centre must keep evidence of unit achievement. Further information on credit transfer can be found in the document *SCQF Credit Accumulation and Transfer policy,* available on our website, qualifications.pearson.com

10 Centre recognition and approval

Centre recognition

Centres that have not previously offered Pearson SVQs need to apply for, and be granted, centre recognition and approval as part of the process for approval to offer individual qualifications. Centres already delivering Pearson NVQs will not need to apply for centre approval to deliver Pearson SVQs but will need to apply for qualification approval.

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

Guidance on seeking approval to deliver Pearson SVQs is available on our website, qualifications.pearson.com

Approvals agreement

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

11 Quality assurance of centres

Quality assurance is at the heart of vocational qualifications. Centres are required to declare their commitment to ensuring quality and to giving candidates appropriate opportunities that lead to valid and accurate assessment outcomes.

Centres must follow quality assurance requirements for standardisation of assessors and internal verifiers and the monitoring and recording of assessment processes. Pearson uses external quality assurance procedures to check that all centres are working to national standards. It gives us the opportunity to identify and provide support to safeguard certification and quality standards. It also allows us to recognise and support good practice.

Centres offering competence-based qualifications will usually receive two standards verification visits per year (a total of two days per year). The exact frequency and duration of standards verifier visits will reflect the centre's performance, taking account of the:

● number of assessment sites

● number and throughput of candidates

● number and turnover of assessors

● number and turnover of internal verifiers.

In order for certification to be released, confirmation is required that the National Occupational Standards (NOS) for assessment and verification, and for the specific occupational sector are being met consistently.

For further details, please go to the *Quality Assurance Handbook NVQ/SVQ* and the *Pearson Edexcel NVQs, SVQs and competence-based qualifications – Delivery Requirements and Quality Assurance Guidance* on our website, qualifications.pearson.com

12 Unit format

Each unit has the following sections.

Unit title

The unit title is on the SCQF and this form of words will appear on the candidate's Notification of Performance (NOP).

Unit code

Each unit is assigned a unit code that appears with the unit title on the SQA accredited qualification structure.

SCQF level

All units and qualifications within Scottish qualifications have a Scottish Credit and Qualifications Framework (SCQF) level assigned to them. There are 12 levels of achievement which show the depth and complexity of learning/competence, skills and knowledge required to achieve the qualification.

Credit points

All units have credit points. Credit points show the volume of learning required to achieve a qualification. One SCQF credit point equals 10 notional learning hours.

Unit summary

This summarises the purpose of the unit and the learning the unit offers.

Unit assessment requirements

The SSC set the assessment requirements. Candidates must provide evidence according to each of the requirements stated in this section.

Terminology

Key terms and concepts that feature in the unit.

Assessment outcomes and standards

The requirements the candidate is expected to meet to achieve the unit. These requirements are under subheadings of 'knowledge and understanding' and 'performance criteria'.

Knowledge and understanding

The knowledge that the candidate needs to be able to understand what they are doing and why.

Performance criteria

The level of competence the candidate has to achieve.

Unit 1: Show Understanding of Customer Service

Unit code:	**CFACSF3**
SCQF level:	**7**
Credit points:	**6**

Unit summary

Industries and organisations have developed a language and approach for customer service that is recognised and understood as the basis for service excellence. You need to understand and apply this language and approach if you are to become a true customer service professional.

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

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Customer service; customer care; contact centres; communication; problem solving; behaviours; customer service principles; customer service professional; work with colleagues; customer service language; service offer; financial limitations; services

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Show understanding of customer service principles	
1	how your organisation's service offer manages customer expectations within financial and other resource limitations
2	how customers form their expectations of services or products
3	how customer service can contribute to best value in a public sector or third sector organisation
4	how customer service can provide a competitive advantage for a commercial organisation
5	how you deal with different customer behaviours and personalities to achieve customer satisfaction
6	the importance of effective communication and teamwork for the delivery of excellent customer service
7	the importance of continuous improvement within customer service
8	the key policies and procedures in your organisation for the delivery of services or products and why it is important to follow them
9	how your industry's approach to customer service differs from the approach of one other industry
10	the service offer of competitors of your organisation or any organisations offering similar services or products
11	the features and benefits of your organisation's services or products that influence customer service delivery and customer satisfaction
12	how your organisation balances its needs and goals with customer expectations and needs
13	the ethical and value base of your organisation's approach to customer service

Performance criteria	
Use accepted customer service language	
1	communicate to customers your organisation's service offer, how it balances organisational and customer needs and how it meets customer expectations
2	compare the service offers of commercial, public sector and third sector organisations and how they each meet customer expectations
3	discuss with colleagues steps that team members can take to deal with different customers and different customer service situations
Apply customer service principles in your customer service role	
4	follow the key policies and procedures in your organisation for the delivery of services or products
5	show an awareness of how your organisation's service approach and service offer fit within your own industry and differ from those of other industries
6	show an awareness of how your organisation's service approach and service offer differ from your organisation's competitors
7	discuss with colleagues how your organisation's ethical and value base fits with organisational needs and customer expectations

Unit 2: Show Understanding of the Rules that Impact on Improvements in Customer Service

Unit code:	**CFACSF4**
SCQF level:	**6**
Credit points:	**6**

Unit summary

The job of a customer service professional is to develop and improve customer service. However, this must be done within a framework of organisational procedures, regulation and legislation. Some of this framework applies only to your organisation, some applies to your industry sector and some is based on national regulation and legislation.

This unit is about the rules, regulation and legislation that can impact on the way you develop and improve customer service. It requires you to demonstrate that you follow those rules when taking actions to improve customer service.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Rules; regulations; legislation; improve customer service; customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information; services; products

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Show understanding of the rules that impact on improvements in customer service	
1	organisational policies, procedures and practices that you need to take into account when you propose improvements in customer service
2	how you gain approval to change customer service procedures or practices
3	the limits of your own authority and who else in the organisation needs to be involved if you cannot authorise improvements alone
4	how you would involve colleagues or service partners in the implementation of improvements
5	relevant legislation and external regulation relating to consumer protection and data protection
6	relevant legislation and external regulation relating to diversity, inclusion and discrimination
7	relevant legislation and external regulation relating to health and safety of customers and colleagues
8	the need to balance the requirements of legislation and external regulation with the needs and objectives of your organisation
9	legislation and external regulation that affect customer service in your industry in particular

Performance criteria	
Show understanding of the organisational rules and procedures that impact on customer service improvements	
1	identify organisational policies, procedures and practices that may impact on proposed improvements in customer service
2	show an awareness of the procedures and actions needed to secure approval for proposed improvements in customer service
3	agree with colleagues or service partners the actions needed to meet organisational requirements when implementing proposed customer service improvements
Show an understanding of the legislation and external regulation that impact on customer service improvements	
4	identify relevant customer-related legislation and external legislation that may affect the implementation of customer service improvements
5	identify relevant general business legislation and external regulation that may affect the implementation of customer service improvements
6	balance the requirements of legislation and external regulation with the needs of the organisation when implementing customer service improvements

Unit 3: Deal with Customers in Writing or Electronically

Unit code:	**CFACSA13**
SCQF level:	**6**
Credit points:	**6**

Unit summary

Some customer service delivery involves communicating with your customer in a way that creates a permanent record either in writing or electronically. This form of communication carries risks and implications that are less likely to apply to a conversation held with your customer face to face or on the telephone.

This unit is all about how written or electronic communication can be made effective and can contribute to excellent customer service.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Writing; letters; emails; records; contact centres; customer service; communication; problem solving; behaviours; work with others; teamworking; venue

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Deal with customers in writing or electronically	
1	the importance of using clear and concise language
2	the additional significance and potential risks involved in committing a communication to a permanent record format
3	the effects of style and tone on the reader of a written or electronic communication
4	the importance of adapting your language to meet the needs of customers who may find the communication hard to understand
5	your organisation's guidelines and procedures relating to written and electronic communication
6	how to operate equipment used for producing and sending written or electronic communications
7	the importance of keeping your customer informed if there is likely to be any delay in responding to a communication
8	the risks associated with the confidentiality of written or electronic communications
9	the conventions and accepted practices of the channel of communication or electronic platform you are using

Performance criteria	
Use written or electronic communication effectively	
1	operate equipment used to communicate in writing or electronically efficiently and effectively
2	ensure that the period of time between exchanges in writing or electronically represents excellent customer service
3	use language that is clear and concise
4	adapt your use of language to meet the individual needs of your customer
5	ensure that the style and tone of your written or electronic communication follows your organisation's guidelines and matches the service offer
6	follow the conventions and accepted practices of the communication channel or electronic platform you are using
Plan and send an effective written or electronic communication	
7	anticipate your customer's expectations taking account of any previous exchanges you may have had
8	assemble all the information you need to construct the communication
9	plan the objective of your communication
10	format your communication following your organisation's guidelines
11	open the communication positively to establish a rapport with your customer
12	ensure that your customer is aware of the purpose of the communication as early as possible
13	summarise the key point of the communication and any actions that you or your customer will take as a result

Performance criteria	
Handle incoming written or electronic communications effectively	
14	read your customer's communication carefully to identify their precise reason for contacting you
15	identify what they are seeking as the outcome of the contact
16	identify all the options you have for responding to your customer and weigh up the benefits and drawbacks of each
17	choose the option that is most likely to lead to customer satisfaction within the service offer
18	summarise the outcome of the communication and any actions that you or your customer will take as a result

Unit 4: Use Customer Service as a Competitive Tool

Unit code:	**CFACSA14**
SCQF level:	**7**
Credit points:	**8**

Unit summary

Customer service contributes to an organisation's competitive position. Customers of many organisations have choices about the services or products they use and who supplies them. Often the technical features and cost of the service or product are almost identical. If this is the case, the quality of the customer service offered makes all the difference to which supplier the customer chooses.

This unit is about how you can play your part in ensuring that your organisation makes the best possible use of the competitive advantage that can be gained from offering superior customer service. It covers how you use customer service as a tool to compete effectively with other providers of similar services or products. The unit is not for you if your organisation does not compete actively with others.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Competition; services; products; customer service; communication; problem solving; behaviours; work with others; teamworking

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Use customer service as a competitive tool	
1	the factors that lead to customers' belief that they are enjoying value for money
2	how to research and compare services or products, including using the internet and social media sources
3	the services or products offered by your organisation
4	the services or products offered by competitors
5	features and benefits of services or products that are seen by customers as added value
6	the purpose of adding non-chargeable items to the service offer in order to impress customers and develop customer loyalty
7	how to portray a positive image that reinforces your organisation's competitive position
8	your organisation's customer service targets and cost implications of added value actions to improve the organisation's competitive position
9	complementary services or products that may be of interest to your customers

Performance criteria
Organise customer service to gain a competitive advantage
1	develop your own and colleagues' understanding of the services or products offered by your organisation
2	define your organisation's service offer and the ways in which it compares with those of your competitors
3	set an example for colleagues and present an image to your customers that reinforces your organisation's service offer
4	encourage customer service actions that create and develop customer loyalty
Deliver a competitive service
5	take positive actions and encourage colleagues to take actions that provide individual customers with added value within your organisation's service offer
6	remind your customers about your service offer and the extra benefit it provides over those of your competitors
7	offer additional technical advice to customers within your organisation's service offer
8	show awareness of the financial implications of any added value actions that you or your colleagues might offer
9	meet customer service targets to ensure that your customers see the benefit of dealing with you rather than with a competitor
10	re-direct customers to other service providers without causing offence when their expectations cannot be met by your organisation's service offer
11	ensure that customers who have shown a previous interest in repeat and additional services are reminded of this
12	encourage colleagues to offer complementary services or products when customer satisfaction indicates that your customers would be interested in them

Unit 5: Organise the Promotion of Additional Services or Products to Customers

Unit code:	**CFACSA15**
SCQF level:	**6**
Credit points:	**7**

Unit summary

This unit is about expanding and extending the relationship with your customers by persuading them to make use of additional services or products that you can offer. Your services or products will remain viable only if they are used by customers.

The unit covers the way you organise customer service to promote additional use of your services or products by communicating with customers and then delivering those services or products effectively. It is also about monitoring your successes and failures and recognising the best way to approach your customers with additional services or products in the future.

You need to show that you are promoting the services or products by encouraging more people to use them.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Promoting; services; products; additional; organise; delivery; customer service; communication; problem solving; behaviours; work with others; teamwork

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Organise the promotion of additional services or products to customers	
1	your organisation's procedures and systems for encouraging the use of additional services or products
2	how the use of additional services or products will benefit your customers
3	the main factors that influence customers to use your services or products
4	how to introduce additional services or products to your customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products
5	how to give appropriate, balanced information to your customers about services or products
6	the importance of the influence of others when your customer is making decisions about additional services or products

Performance criteria	
Offer additional services or products	
1	offer additional services or products to your customers
2	identify the benefits of offering additional services or products for your customers and the organisation
3	explain the features and benefits of additional services or products to your customers
4	identify ways of encouraging customers to ask about additional services or products
Organise support to promote use of additional services or products	
5	discuss with others ways of promoting additional services or products to your customers
6	implement procedures to ensure that customers interested in additional services or products are dealt with promptly
7	promote services or products which will suit your customers but which are supplied from outside your own area of the organisation
8	help customers to access services or products which are supplied outside of your own area of the organisation
Monitor the promotion of additional services or products	
9	devise methods to inform customers about additional services or products
10	use different methods to inform customers about additional services or products and record successes and failures against each method
11	use your record of successes and failures to identify the best approach for offering additional services or products
12	share information with others regarding the best approach to take when offering additional services or products to your customers

Unit 6:   Build a Customer Service Knowledge Base

Unit code: CFACSA16

SCQF level: 7

Credit points: 7

Unit summary

Effective and improving customer service may make use of a customer service knowledge base. This knowledge base is built up continuously as the organisation learns from interaction with its customers. A knowledge base may contain a wide variety of information about customers and their transactions with the organisation. It may be drawn from a wide variety of sources. It will, in any case, rely on the actions of you and colleagues in direct contact with customers to build and grow as a useful customer service tool.

This unit is all about actions you take to add to the knowledge base and how you use it to develop the way you deal with customer transactions.

This unit is for you only if your organisation has a systematic and technology supported approach to building a customer knowledge base.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Improving customer service; knowledge; interaction; colleagues; customer transaction; customer service; communication; problem solving; behaviours; work with others; teamworking

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Build a customer service knowledge base	
1	the structure and content of your organisation's customer service knowledge base
2	input and update routines for adding to the customer service knowledge base
3	ways in which information for a customer service knowledge base can be drawn from different sources, including social media platforms
4	ways that information in a customer service knowledge base can be classified
5	questions frequently asked by customers of your organisation
6	the importance of working with colleagues to develop responses to customer requests and queries
7	your organisation's key messages in relation to the services or products you are delivering
8	ways to interpret information in a customer service knowledge base
9	techniques for assisting a colleague to locate information in a customer service knowledge base

Performance criteria	
Input details of customer queries and requests and develop responses	
1	identify through active listening customer queries and comments for inclusion in the knowledge base
2	classify information collected through customer contact for inclusion in the knowledge base
3	identify questions frequently asked by customers
4	identify the broad customer service messages of your organisation's answers to frequently asked questions
5	work with colleagues to develop responses to customer queries and requests
6	contribute ideas and responses to the customer knowledge base which build on key organisational customer service messages
7	check the effects of possible responses included in the knowledge base with customers during live customer service delivery or in trials
8	monitor the customer service knowledge base to identify trends and patterns
Use a customer service knowledge base	
9	access information from the customer service knowledge base using specific search criteria
10	browse the customer service knowledge base to research a topic of interest or project area
11	use the customer service knowledge base to inform the introduction of a new product or service variation
12	use the customer service knowledge base to respond to a specific customer request or query
13	assist a colleague to locate specific information in the customer service knowledge base
14	add to the customer service knowledge base as a result of dealing with a customer request or query

Unit 7: Deliver Customer Service using Service Partnerships

Unit code:	**CFACSB9**
SCQF level:	**6**
Credit points:	**6**

Unit summary

Excellent customer service relies on teamwork. In many situations, successful delivery of service to end user customers relies on a complete service chain of internal or external customers and internal or external suppliers. For this to work, a series of service partnerships must be formed which will enable the chain to work efficiently and effectively.

This unit is all about how to work effectively within a service chain and how to develop the links that cement key relationships. Effective communication and understanding of the roles of different organisations, departments and individuals are central to this area of your work.

Do not choose this unit if you have difficulty identifying a service chain that relies on you in your role developing effective service partnerships.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Service partnerships; service chain; internal customer; external customer; suppliers; build relationships; understanding; customer service; communication; problem solving; behaviours; work with others; giving information; teamwork; receiving

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Deliver customer service using service partnerships	
1	the responsibilities and rights that can be built into an internal customer/supplier relationship
2	the benefits and drawbacks of describing a relationship in a service chain as a supplier/customer relationship or a service partnership
3	how to establish priorities if internal customer demands conflict with external customer demands
4	how to maintain team identity whilst working constructively with other teams to deliver excellent customer service
5	how to negotiate successfully with internal customers or suppliers
6	the formal and informal structures of the organisation and how they can influence relationships
7	how to use all available sources of information about strategic service partners and social media to develop positive working relationships

Performance criteria	
Work effectively within a customer service chain	
1	explain who is involved in the service chain that supplies your end user customers
2	identify which of those involved in your service chain is internal and which is external to your organisation
3	explain how the way you work with individual service partners contributes to an overall service chain
4	use the principles and practices applied to external customers to deliver excellent customer service to internal customers
5	work with internal customers and internal or external suppliers in the service chain to improve service to external customers
6	communicate effectively with internal customers to ensure that they are aware of any aspects of your work that might affect them
Build and nurture positive relationships in a customer service chain	
7	create a positive relationship between internal or external suppliers and customers by establishing rapport and showing understanding of everyone's roles in the service chain
8	identify where power and authority exist within the service chain
9	negotiate with internal customers and internal or external suppliers to establish service procedures that are acceptable to all and contribute to excellent customer service
10	develop positive relationships with an internal customer or supplier that are reflected in a formal or informal service level agreement that makes a positive contribution to the relationship
11	work with colleagues to develop and maintain awareness that a team within a service chain cannot work in isolation
12	agree with service partners how your work will be prioritised if there is a conflict of interest between the demands of internal and external customers

Unit 8: Organise the Delivery of Reliable Customer Service

Unit code: CFACSB10

SCQF level: 6

Credit points: 6

Unit summary

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

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Organising; delivery; reliable; resources; systems; support service; customer service; communication; problem solving; behaviours; work with others; teamworking; giving information; receiving information services; products

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Organise the delivery of reliable customer service	
1	organisational procedures for unexpected situations and your role within them
2	resource implications in times of staff sickness and holiday periods and your responsibility at these times
3	the importance of having reliable and fast information for your customers and your organisation
4	organisational procedures and systems for delivering customer service
5	how to identify useful customer feedback and how to decide which feedback should be acted on
6	how to communicate feedback from customers to others
7	organisational procedures and systems for recording, storing, retrieving and supplying customer service information
8	legal and regulatory requirements regarding the storage of data

Performance criteria	
Plan and organise the delivery of reliable customer service	
1	plan, prepare and organise everything you need to deliver services or products to different types of customers
2	organise what you do to ensure that you are consistently able to give prompt attention to your customers
3	reorganise your work to respond to unexpected additional workloads
Review and maintain customer service delivery	
4	maintain service delivery during very busy periods and unusually quiet periods
5	maintain service delivery when systems, people or resources have let you down
6	consistently meet your customers' expectations
7	balance the time you take with your customers with the demands of other customers seeking your attention
8	respond appropriately to your customers when they make comments about the services or products you are offering
9	alert others to repeated comments made by your customers
10	take action to improve the reliability of your service based on customer comments
11	monitor the action you have taken to identify improvements in the service you give to your customers

Performance criteria	
Use recording systems to maintain reliable customer service	
12	record and store customer service information accurately following organisational guidelines
13	select and retrieve customer service information that is relevant, sufficient and in an appropriate format
14	quickly locate information that will help solve a customer's query
15	supply accurate customer service information to others using the most appropriate method of communication

Unit 9: Improve the Customer Relationship

Unit code:	**CFACSB11**
SCQF level:	**6**
Credit points:	**7**

Unit summary

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

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Relationships; customer service; reliable; exceed expectations; external customer; internal customer; loyalty; service partnerships; customer service; communication; problem solving; behaviours; work with others; giving information; teamwork

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Improve the customer relationship	
1	how to make best use of the method of communication chosen for dealing with your customers
2	how to negotiate effectively with your customers
3	how to assess the costs and benefits to your customer and your organisation of any unusual agreement you make
4	the importance of customer loyalty and/or improved internal customer relationships to your organisation
5	how to monitor information about your interaction with customers from every available source including internet communication channels and social media platforms

Performance criteria	
Improve communication with your customers	
1	select and use the best method of communication to meet your customers' expectations
2	take the initiative to contact your customers to update them when things are not going to plan or when you require further information
3	adapt your communication to respond to individual customers' feelings
4	monitor information about your interaction with customers using all available information channels
Balance the needs of your customer and your organisation	
5	meet your customers' expectations within your organisation's service offer
6	explain the reasons to your customers sensitively and positively when their expectations cannot be met
7	identify alternative solutions for your customers either within or outside the organisation
8	identify the costs and benefits of these solutions to your organisation and to your customers
9	negotiate and agree solutions with your customers which satisfy them and are acceptable to your organisation
10	take action to satisfy your customers with the agreed solution when balancing their needs with those of your organisation
Exceed customer expectations to develop the relationship	
11	make extra efforts to improve your relationship with your customers
12	recognise opportunities to exceed your customers' expectations
13	take action to exceed your customers' expectations within the limits of your own authority
14	gain the help and support of others to exceed your customers' expectations

Unit 10: Deliver Customer Service in an Environmentally Friendly and Sustainable way

Unit code:	**CFACSB17**
SCQF level:	**5**
Credit points:	**3**

Unit summary

Environmental awareness and positive action on sustainability form an important part of the culture and strategy in many organisations. Those organisations have devised policies to ensure that they gain the approval of customers and other stakeholders by promoting a sustainable approach to their services or products. An ethical approach to the environment can enhance the organisation's reputation. This approach is achieved only if those delivering the service follow guidelines and procedures in order to display personal and organisational commitment to the environment and sustainability.

This unit addresses the balances that must be found when delivering customer service while meeting environmental standards.

The unit is appropriate for you if your organisation has a clear commitment to sustainability and if aspects of your job role make a direct contribution to that.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Customer service delivery; customer service behaviours and processes; environmental awareness; positive action on sustainability

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Deliver customer service in an environmentally friendly and sustainable way	
1	principles of environmental practices and on-going sustainability that are relevant to customer service operations
2	organisational policies that link environmental issues with customer service
3	principles of energy saving and reducing carbon emissions
4	principles of waste management relevant to your organisation
5	the environmental issues and risks represented by your organisation's services or products
6	your organisation's procedures for energy, carbon emission and waste management
7	how to keep customers informed about your organisation's environmental policies and procedures
8	how to work with service partners to promote environmental and sustainable benefits
9	organisational procedures for passing on ideas for environmental improvements
10	the importance of having appropriate authority for implementing changes in customer service procedures
11	the importance of recognising that environmental actions involve cost for your organisation

Performance criteria	
Follow organisational policies and procedures to deliver customer service in an environmental and sustainable way	
1	encourage customers to contribute to your organisation's environmental policies
2	keep customers informed about your organisation's environmentally friendly and sustainable policies
3	contribute to activities and actions to improve your organisation's environmentally friendly approach
4	follow your organisation's procedures to promote environmentally friendly and sustainable approaches when dealing with service partners
5	keep service partners informed about your organisation's environmentally friendly and sustainable policies
Contribute to the development of environmentally friendly and sustainable customer service procedures	
6	identify opportunities for energy and carbon emission savings when following organisational customer service procedures
7	identify opportunities for waste management improvements when following organisational customer service procedures
8	follow organisational procedures to inform those with appropriate authority of opportunities to improve environmental aspects of customer service
9	work with colleagues to implement environmental improvements in customer service
10	communicate with customers about environmental improvements in customer service

Unit 11:   Monitor and Solve Customer Service Problems

Unit code: **CFACSC5**

SCQF level: **6**

Credit points: **6**

Unit summary

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.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Monitor problems; solve problems; customer service problems; customer loyalty; impress; customer service; communication; problem solving; behaviours; work with others; team working; giving information; receiving information services; products

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Monitor and solve customer service problems	
1	organisational procedures and systems for dealing with customer service problems
2	organisational procedures and systems for identifying repeated customer service problems
3	how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers
4	how to negotiate with and reassure customers while their problems are being solved
5	the opportunities and potential for monitoring and solving customer service problems presented by remote information collection and sharing such as through social media

Performance criteria	
Solve immediate customer service problems	
1	respond positively to customer service problems following organisational guidelines
2	solve customer service problems when you have sufficient authority
3	work with others to solve customer service problems
4	keep customers informed of the actions being taken
5	check with customers that they are comfortable with the actions being taken
6	solve problems with service systems and procedures that might affect customers before they become aware of them
7	inform managers and colleagues of the steps taken to solve specific problems
Identify repeated customer service problems and options for solving them	
8	identify repeated customer service problems
9	identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option
10	work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of your organisation

Performance criteria	
Take action to avoid the repetition of customer service problems	
11	obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated
12	action your agreed solution
13	keep your customers informed in a positive and clear manner of steps being taken to solve any service problems
14	monitor the changes you have made and adjust them if appropriate

Unit 12: Apply Risk Assessment to Customer Service

Unit code:	CFACSC6
SCQF level:	7
Credit points:	10

Unit summary

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

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Risk assessment; risks; health; safety; awareness; identifying; assessing; classifying; prioritising; minimise risks; customer service; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding
Apply risk assessment to customer service
1	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)
2	risk assessment techniques
3	how to evaluate risk using the probability of occurrence and consequences of occurrence
4	the nature of potential customer service risks including financial, reputational and health and safety risks
5	cost/benefit analysis
6	SWOT (Strengths, Weaknesses, Opportunities, Threats) and PESTLE (Political, Economic, Social, Technological, Legal, Environmental) analysis

Performance criteria	
Analyse customer service processes for risk	
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
2	identify the financial risks in each stage of the customer service process
3	identify the reputational risks in each stage of the customer service process
4	identify the health and safety risks in each stage of the customer service process
5	identify the risk of delivering sub-standard services or products in each stage of the customer service process
6	ensure that your customers are aware of any risks that might impact on them
7	develop staff awareness of the risks you have identified
Assess customer service risks and take appropriate actions	
8	assess the probabilities of each risk that you have identified
9	assess the potential consequence of each risk in terms of finance, reputation and health and safety
10	classify each risk as high, medium or low taking into account its probability and potential consequences
11	work with colleagues to identify any actions that might be taken to reduce risk
12	take appropriate actions to minimise the overall customer service risk profile by adapting procedures

Unit 13:   Process Customer Service Complaints

Unit code: CFACSC7

SCQF level: 7

Credit points: 6

Unit summary

This unit is about the process of handling complaints. In any customer service situation a customer who is not satisfied may resort to making a complaint. Complaints may be justified or unjustified but in either case 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.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Complaints; problems; procedures; resolution; compensation; customer service; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information services; products

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Process customer service complaints	
1	how to monitor the level of complaints and identify those that should provoke a special review of the service offer and service delivery
2	why dealing with complaints is an inevitable part of delivering customer service
3	organisational procedures for dealing with complaints
4	how to negotiate a solution with your customer that is acceptable to that customer and to the organisation
5	the regulatory definition of a complaint in your sector and the regulatory requirements of how complaints should be handled and reported
6	when to escalate a complaint by involving more senior members of the organisation or an independent third party
7	the cost and regulatory implications of admitting liability for an error made by your organisation
8	how to spot and interpret signals that your customer may be considering making a complaint
9	techniques for handling conflict
10	the importance of dealing with a complaint promptly

Knowledge and understanding	
11	why the offer of compensation or replacement service or products may not always be the best options for resolving a complaint
12	how the successful handling of a complaint presents an opportunity to impress a customer who has been dissatisfied
13	the most effective forms of response when complaints are submitted through different channels such as social media

Performance criteria

Recognise the signs that a query or problem is about to produce a complaint

1	identify signs that a customer is becoming dissatisfied with the customer service of your organisation
2	take action to change the situation so that the query or problem does not result in a complaint
3	take actions to change your customer service approach in order to avoid future complaints when a justified complaint has been made

Deal with a complaint effectively

4	ensure that you have a clear understanding of the nature and details of the complaint
5	investigate the facts of the complaint in order to establish whether it should be dealt with as a justified complaint or an unjustified complaint
6	identify all the possible options for a solution and consider the benefits and drawbacks of each option for your customer and for your organisation
7	assess the risks to your organisation of choosing each option
8	report the findings of your investigation to your customer and offer your chosen solution
9	escalate the complaint by involving more senior members of your organisation or an independent third party if there is sufficient reason to do so
10	give feedback to other colleagues involved which will help them avoid future complaints
11	keep clear records of the way the complaint has been handled to avoid later misunderstandings

Unit 14: Work with others to Improve Customer Service

Unit code:	**CFACSD8**
SCQF level:	**6**
Credit points:	**8**

Unit summary

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

This unit is about how you develop a relationship with others to improve your customer service performance.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information; services; products

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Work with others to improve customer service	
1	who else is involved either directly or indirectly in the delivery of customer service
2	the roles and responsibilities of others in your organisation
3	the roles of others outside your organisation who have an impact on your services or products
4	what the goals or targets of your organisation are in relation to customer service and how these are set
5	how your organisation identifies improvements in customer service

Performance criteria
Improve customer service by working with others
1	contribute constructive ideas for improving customer service
2	identify what you have to do to improve customer service and confirm this with others
3	agree with others what they have to do to improve customer service
4	co-operate with others to improve customer service
5	keep your commitments made to others
6	make others aware of anything that may affect plans to improve customer service
Monitor your own performance when improving customer service
7	discuss with others how what you do affects customer service performance
8	identify how the way you work with others contributes towards improving customer service
Monitor team performance when improving customer service
9	discuss with others how teamwork affects customer service performance
10	work with others to collect information on the team's customer service performance
11	identify with others how customer service teamwork could be improved
12	take action with others to improve customer service performance

Unit 15:   Promote Continuous Improvement

Unit code:	**CFACSD9**
SCQF level:	**7**
Credit points:	**7**

Unit summary

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

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Identifying changes; consequences; organising; continuous improvement; customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information; service

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Promote continuous improvement	
1	how service improvements in your area affect the balance between overall customer satisfaction, the costs of providing service and regulatory requirements
2	how customer experience is influenced by the way service is delivered
3	how to collect, analyse and present customer feedback
4	how to make a business case to others to bring about change in the services or products you offer
5	how developments in communication channels such as social media present opportunities for customer service improvements

Performance criteria
Plan improvements in customer service based on customer feedback

1	gather feedback from customers that will help to identify opportunities for customer service improvement
2	analyse and interpret feedback to identify opportunities for customer service improvements and propose changes
3	discuss with others the potential effects of any proposed changes for your customers and your organisation
4	negotiate changes in customer service systems and improvements with somebody with sufficient authority to approve trial or full implementation of the change

Implement changes in customer service	
5	organise the implementation of authorised changes
6	implement the changes following organisational guidelines
7	inform people inside and outside your organisation who need to know of the changes being made and the reasons for them
8	monitor early reactions to changes and make appropriate fine-tuning adjustments

Review changes to promote continuous improvement	
9	collect and record feedback on the effects of changes
10	analyse and interpret feedback and share your findings on the effects of changes with others
11	summarise the advantages and disadvantages of the changes
12	use your analysis and interpretation of changes to identify opportunities for further improvement
13	present these opportunities to somebody with sufficient authority to make them happen

Unit 16: Develop Your Own and Others' Customer Service Skills

Unit code:	**CFACSD10**
SCQF level:	**6**
Credit points:	**8**

Unit summary

This unit is about taking responsibility for continuously developing your own customer service skills and passing those skills on to others. It is about helping yourself and others to learn and grow in your customer service roles. You may not be a manager or a supervisor but you may be responsible for showing others how things work and what they need to do. For example a new member of staff may need an introduction to the products, services, systems or procedures of your organisation and you may be asked to show them. Or you may need to coach someone from another department who has been transferred. Also, there may be the introduction of a new product, service, system or procedure that you are asked to learn about and present or demonstrate to others.

This unit will help you to put 'showing others' into a formal framework that will help them to learn and improve your own coaching skills. The delivery of excellent customer service depends on your skills and the skills of those around you.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Developing skills; continuous development; improvement; coaching; demonstrating; customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others; team working; giving information; receiving information

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Develop your own and others' customer service skills	
1	organisational systems and procedures for developing your own and others' personal performance in customer service
2	how your behaviour impacts on others
3	how to review effectively your personal strengths and development needs
4	how to put together a personal development plan for yourself or a colleague that will build on strengths and overcome weaknesses in areas that are important to customer service
5	how to obtain useful and constructive personal feedback from others
6	how to respond positively to personal feedback
7	how to put together a coaching plan that will build on the strengths of the candidate and overcome their weaknesses in areas that are important to customer service and their job role
8	how to give useful and constructive personal feedback to others
9	how to help others to respond positively to personal feedback

Performance criteria	
Develop your own customer service skills	
1	agree with a manager or mentor the specific customer service skills you need in your customer service role
2	agree the actions you need to take to improve your customer service skills
3	draw up a personal development plan based on your agreed actions to improve your customer service skills
4	carry out your personal development activities and review your progress
5	obtain feedback from your manager or mentor about your customer service performance and update your personal development plan
Plan the coaching of others in customer service	
6	identify and agree with colleagues specific customer service skills and knowledge they need in their customer service role
7	identify opportunities for colleagues to take actions to develop their customer service skills
8	plan and organise activities and coaching sessions for colleagues to help them develop their customer service skills
Coach others in customer service	
9	coach colleagues to develop specific and agreed customer service skills
10	give colleagues the opportunity to practise skills, apply knowledge and gain experience to develop customer service competence
11	regularly check the progress of colleagues and modify your coaching as appropriate
12	give regular feedback to colleagues about the progress they are making
13	explain clearly to colleagues how ongoing support will be provided

Unit 17: Lead a Team to Improve Customer Service

Unit code:	**CFACSD11**
SCQF level:	**7**
Credit points:	**7**

Unit summary

If you are responsible for leading a team delivering customer service, you need to plan and organise their work and support them as they develop their performance.

This unit is about looking at both your organisation and your staffing resources and bringing these together in a constructive way to improve overall customer service.

You need to give support and guidance to your team to encourage them to improve their customer service delivery. It is about having a passion for customer service and sharing this enthusiasm with your colleagues and staff team. It is about leading by example.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Team leading; customer service; contact centres; staffing resources; support, guidance; leading by example; developing; improving; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information; services

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Lead a team to improve customer service	
1	the roles and responsibilities of your team members and where they fit in with the overall structure of the organisation
2	how team and individual performance can affect the achievement of organisational objectives
3	the implications of failure to improve customer service for your team members and your organisation
4	how to plan work activities
5	how to present plans to others to gain understanding and commitment
6	how to facilitate meetings to encourage frank and open discussion
7	how to involve and motivate staff to encourage teamwork
8	how to recognise and deal sensitively with issues of underperformance

Performance criteria

Plan and organise the work of a team

1	treat team members with respect at all times
2	agree with team members their role in delivering effective customer service
3	involve team members in planning and organising their customer service work
4	allocate work which takes full account of team members' customer service skills and the objectives of the organisation
5	motivate team members to work together to raise their customer service performance

Provide support for team members

6	check that team members understand what they have to do to improve their work with customers and why that is important
7	check with team members what support they feel they may need throughout this process
8	provide team members with support and direction when they need help
9	encourage team members to work together to improve customer service

Review performance of team members

10	provide sensitive feedback to team members about their customer service performance
11	encourage team members to discuss their customer service performance
12	discuss sensitively with team members action they need to take to continue to improve their customer service performance

Unit 18: Gather, Analyse and Interpret Customer Feedback

Unit code:	**CFACSD12**
SCQF level:	**7**
Credit points:	**10**

Unit summary

Customer service can be improved only if you are fully aware of customer wishes and expectations. You can discover much of this information by seeking structured feedback from your customers about their experiences of your services or products. When the information has been collected it must be analysed and interpreted in order to use it for making customer service improvements.

This unit is all about how you collect that feedback and prepare it for use in the improvement of customer service.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Gather feedback; analyse feedback; interpret feedback; customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information; services; products

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Gather, analyse and interpret customer feedback	
1	random sampling techniques and how to evaluate bias in non-random samples
2	principles of questionnaire design
3	principles of effective interviewing
4	how to calculate the cost of a customer survey
5	techniques for monitoring data collection
6	how to use appropriate software to record and analyse customer feedback
7	methods of displaying and presenting data in a way that is easy to understand
8	statistical techniques for summarising trends and patterns
9	organisational procedures for recommending changes in the service offer or customer service procedures
10	the advantages and disadvantages of collecting customer feedback through written questionnaires, by telephone, by interview, using focus groups, through internet, e-mail or social media
11	the importance of validating feedback submitted through electronic channels such as social media to ensure that it represents genuine customer opinions

Performance criteria

Plan to gather customer feedback

1	identify the options available for collecting customer service feedback
2	evaluate the costs and benefits of each option for collecting customer feedback
3	select one or more methods for collecting customer feedback
4	plan in detail what information you will collect from customers
5	ensure the information you collect has a customer service focus
6	plan in detail how you will collect information from customers using your chosen method

Gather customer feedback

7	use your chosen method and detailed plan to collect customer feedback
8	monitor the collection of customer feedback to ensure it is falling within your chosen sampling frame
9	monitor the collection of customer feedback to ensure it focuses on customer service issues
10	record the data you collect in a way that makes analysis and interpretation easy
11	respect your customers' rights to confidentiality if they do not want their comments to be identified

Performance criteria	
Analyse and interpret customer feedback	
12	collate data collected from customers in order to identify patterns and trends in customer service
13	perform appropriate calculations to summarise patterns and trends in the data
14	present your analysis in a form that is easily understood
15	link your analysis with your knowledge of your organisation's service offer and customer service processes in order to interpret the meaning of the data
16	make recommendations for changes in your organisation's service offer or customer service processes in response to the views of your customers
17	identify ways in which customer feedback can be used to inform customers and develop the customer relationship

Unit 19: Monitor the Quality of Customer Service Transactions

Unit code:	**CFACSD13**
SCQF level:	**6**
Credit points:	**7**

Unit summary

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

This unit is for you if one of your job responsibilities involves systematically sampling the quality of customer service transactions and working with colleagues to improve their performance.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall Skills CFA Assessment Strategy in *Annexe A*.

Terminology

Monitoring quality; customer service transactions; performance ratings; face to face; telephone; online; measure; patterns and trends; customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Monitor the quality of customer service transactions	
1	the criteria against which the quality of customer service delivery is judged in your organisation
2	ways to construct a representative sample of customer service transactions in order to monitor quality
3	the importance of compliance with guidelines about ensuring customers and colleagues know they are being observed to monitor quality of service
4	ways to define ratings and scales against which customer service transactions can be judged
5	your organisation's procedures and guidelines for customer service delivery
6	ways to record details of customer service transactions you have observed in order to provide feedback
7	techniques for analysing and summarising observations in order to identify patterns and trends in customer service delivery
8	the importance of providing positive feedback to a colleague prior to identifying areas for improvement
9	sources of information about coaching and training options to improve customer service delivery
10	the importance of keeping detailed records of coaching and training relating to customer service delivery

Performance criteria	
Prepare to monitor the quality of customer service transactions	
1	identify the criteria against which quality of customer service transactions will be monitored
2	agree a sampling frame for monitoring customer service transactions
3	follow organisational procedures to ensure your monitoring plans are compliant with any need for staff and customers to know they are being observed
4	identify ratings and scales against which quality of customer service transactions can be measured
5	ensure that you are totally familiar with the customer service procedures for transactions you are monitoring
Monitor the quality of customer service transactions	
6	carry out spot checks on or observations of the quality of customer service transactions
7	carry out planned and routine checks on or observations of the quality of customer service transactions
8	observe or listen to a colleague dealing with a customer service transaction
9	record your observations of a colleague's performance against agreed quality criteria
10	make judgements about your colleague's quality of service delivery by allocating a performance rating against a defined and agreed rating scale
11	analyse and summarise your observations to identify patterns and trends in your colleague's performance

Performance criteria
Give feedback on the quality of customer service transactions

12	engage with your colleague in preparation for giving feedback on the quality of their customer service delivery
13	provide positive feedback to your colleague by identifying features of customer service that they delivered particularly well
14	give feedback to your colleague regarding features of their customer service delivery that would benefit from development
15	propose actions for coaching or training of a colleague in areas that would improve their customer service delivery
16	maintain records of customer service quality monitoring and action plans for improvements

Unit 20: Implement Quality Improvements to Customer Service

Unit code:	**CFACSD14**
SCQF level:	**8**
Credit points:	**10**

Unit summary

Introducing quality improvements to customer service requires careful management of change. This unit covers the detailed planning of customer service improvements, managing the changes that need to take place to implement the improvements, and then evaluating the results. It includes the consultation and communication processes that are vital to the successful implementation of improvements and management of change. In particular it is vital to involve customers at all stages of the quality improvement process.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Implementing quality; improvements; planning; managing change; consultation; communication processes; quality improvement; customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others; teamwork

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Implement quality improvements to customer service	
1	the importance of careful planning when introducing change
2	the types of factors that may help or hinder the process of change and how to identify and plan for these
3	how to develop plans that contain realistic objectives, tasks and schedules
4	the importance of having clear lines of responsibility and accountability
5	how to identify and plan for possible contingencies
6	the importance of clear communication when changes are taking place
7	why it is important to win the support of people who will be affected by change
8	how to win over staff who are resistant to change
9	the types of support that staff may need when improvements are being implemented and how to provide such support
10	why it is important to complete change on time and within budget
11	how to monitor and evaluate the impact of change
12	why it is important to evaluate change and to note any lessons for future initiatives

Performance criteria	
Plan the introduction of customer service improvements	
1	identify possible customer service improvements and the resources available to implement them
2	evaluate factors that may help or hinder the introduction of change
3	develop realistic objectives, tasks and schedules for the introduction of improvements and agree them with colleagues
4	assess the risks associated with each action to effect change
5	plan how you will evaluate the proposed improvements
Manage the implementation of customer service improvements	
6	inform the people who will be affected by change, win their support and keep them informed of progress
7	implement your plans for improvements dealing effectively with any difficulties
8	provide the necessary support to all your colleagues who are involved with changes and improvements
9	ensure that planned improvements are implemented on time and within budget
Monitor and evaluate customer service improvements	
10	monitor and evaluate the impact that changes are having on the quality of customer service
11	identify and recommend any further changes that may be necessary to achieve the planned aims and objectives of improvements
12	identify any lessons from the change process and note these for future activities

Unit 21: Plan and Organise the Development of Customer Service Staff

Unit code:	**CFACSD15**
SCQF level:	**8**
Credit points:	**9**

Unit summary

Achieving excellent customer service depends on the skills and knowledge of the staff that provide it. To be effective, organisations need to review constantly how effective their customer service is and what improvements should be made. Sometimes customer service improvements will depend on the development of staff skills. New staff must be brought up to the required standards of skills and knowledge and established staff need to be updated on new procedures and techniques or refreshed on existing ones. Senior customer service staff have an important contribution to make to this process.

This unit is about identifying what development and training is needed for staff, organising its delivery and monitoring its success.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Plan; organise; review effectiveness; developing staff; updating staff; new procedures; new techniques; development; training; customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others; teamwork

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Plan and organise the development of customer service staff	
1	the importance of continuously developing staff who provide customer service
2	current objectives and targets that relate to customer service in your area of responsibility
3	how to identify when development and training could improve customer service performance
4	the range of types and styles of development and training and how to select those that are appropriate to customer service, your organisation, and specific training and development needs
5	why it is important that you should have an input into the design and delivery of customer service development and training for your staff
6	how you can help staff to put into practice what they have learned
7	how to assess the impact that development and training has had on customer service performance
8	the types of additional support you could provide to staff following development and training

Performance criteria	
Identify customer service staff development and training needs	
1	identify where customer service could be improved through staff training and development
2	help staff providing customer service to identify their own development and training needs
3	help staff to identify how they learn best
4	agree the types of staff development and training activities that are needed
5	report staff development needs to relevant people in your organisation
Organise customer service development and training	
6	agree the aims and objectives of the customer service development and training activities
7	agree the type and style of customer service development and training that are appropriate
8	agree the detailed design of customer service development and training activities
9	organise customer service development and training activities
10	monitor the performance of staff involved in the development and training activities to be sure that learning is put into practice
11	organise additional help and training for staff where this is needed

Unit 22: Develop a Customer Service Strategy for a Part of an Organisation

Unit code:	**CFACSD16**
SCQF level:	**8**
Credit points:	**11**

Unit summary

If organisations want to be consistently successful in customer service over a period of time, they need a customer service strategy. Managers and other senior staff can contribute to this through their knowledge of the organisation's customers and their expertise in customer service. This contribution is also based on what they know of other organisations and published research into trends in customer service.

This unit does not assume you have full responsibility for your organisation's customer service strategy but that you take a major role in the development of strategy for a particular part of your organisation.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA assessment strategy* in *Annexe A*.

Terminology

Customer service strategy; managers; senior staff; expertise; research; trends; customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others; team working; giving information; receiving information

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Develop a customer service strategy for a part of an organisation	
1	the importance of having a customer service strategy for a given part of the organisation
2	how to access information on your organisation's overall business strategy and analyse its implications
3	sources of information you can use to find out about your customers and their expectations
4	the benefits of using information about customers and their expectations available through social media
5	the importance of customer loyalty and customer service practices that can help to retain loyalty
6	how to identify other organisations which might represent models of best practice in customer service
7	sources of research on trends and developments in customer service
8	how to develop values, aims and objectives relevant to customer service
9	procedures for making recommendations within your organisation

Performance criteria	
Research and evaluate your organisation's business and customer service strategy	
1	identify your organisation's values, aims and objectives
2	identify the role of a given part of the organisation in achieving the strategy
3	evaluate the implications of the strategy for customer service in this part of the organisation
4	confirm the implications of the strategy for customer service with colleagues
5	collect information on and analyse customer expectations
6	match customer expectations with the customer service implications of the business strategy for a given part of your organisation
Help to identify current and future best practice in customer service	
7	identify other organisations which represent models of good practice in customer service
8	evaluate the key features of customer service in these organisations and the principles that underpin their approaches
9	identify and analyse current research on trends and developments in customer service
10	identify and analyse relevant legal and regulatory requirements, codes of practice and ethical considerations
11	explore the implications of your research for the part of the organisation you are working in
12	discuss the outcomes of your research with colleagues

Performance criteria	
Identify and recommend the key features of a customer service strategy	
13	identify values, aims and objectives that are consistent with your research
14	identify contact processes and channels for customer service that are consistent with your values, aims and objectives
15	identify how you will evaluate the effectiveness of the strategy
16	discuss with colleagues the key features of a customer service strategy
17	construct a customer service strategy for the chosen part of the organisation and agree it with colleagues and managers

Unit 23:   Manage a Customer Service Award Programme

Unit code:	**CFACSD17**
SCQF level:	**8**
Credit points:	**7**

Unit summary

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

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Managing; award programme; strategy; motivation; commitment; strategic implications; customer service; contact centres; developing; improving; communication; problem solving; behaviours; work with others; teamwork giving information; receiving information

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Manage a customer service award programme	
1	the principles of motivation and in particular the importance of recognition as a motivator
2	how to make use of customer service award programmes as promotional tools to give added value to customer satisfaction
3	the benefits and drawbacks of different rewards associated with award programmes
4	aspects of organisational culture that may support or detract from the value of a customer service award programme

Performance criteria
Plan a customer service award programme
1	identify all the possible options for a customer service award scheme drawing on examples inside and outside of your own organisation
2	identify the benefits and drawbacks of each option for a customer service award programme
3	choose the option for a customer service award programme that best suits your customer satisfaction and team motivation objectives
4	plan the details of your chosen customer service award programme
5	identify the benefits and costs of your chosen customer service award programme in relation to customer satisfaction and team motivation
6	make a business case for the introduction of a customer service awards programme or for the development of an existing programme
Implement and manage a customer service award programme
7	launch developments in the customer service award programme in a way that informs and motivates customers and team members
8	ensure that the criteria for the customer service awards are transparent and are considered fair by team members
9	publicise the customer service awards programme to customers in a way that demonstrates organisational commitment to excellent customer service
10	organise the judging of individual and team awards in a way that means the results can be justified to the organisation as a whole
11	announce the results and present the awards in a manner that suits the culture of your organisation and customer service team
12	review and evaluate the effects of the customer service awards programme on customers and team members

Unit 24: Apply Technology or other Resources to Improve Customer Service

Unit code:	**CFACSD18**
SCQF level:	**8**
Credit points:	**11**

Unit summary

Customer service changes and improves sometimes through the application of technology or other resources as much as through changes in behaviour of those delivering the service. While these changes can bring real benefits they inevitably come at an initial cost which must be taken into consideration.

This unit is about the process of managing the application of technology or other resources to a customer service process. It involves a systematic approach to considering and evaluating options, implementing the most appropriate and reviewing the results.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Improve customer service; develop customer service; technology; changes; models of good practice; legal; regulatory; research; best practice; evaluate; customer service; contact centres; developing; improving; communication; problem solving; behaviours

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Apply technology or other resources to improve customer service	
1	current trends in information and communication technology (ICT) that imply changes to the channels and social media platforms used by customers
2	features and functionality of available technology that may contribute to improvements in customer service
3	how the application of additional resources other than technology can be used to improve customer service
4	methods for the systematic review of customer service systems
5	techniques to analyse the costs and benefits of options for improving customer service
6	methods for presenting a business case for applying technology or other resources to make improvements in customer service
7	briefing techniques for introducing colleagues to changes
8	ways to review and adjust customer service delivery after the implementation of changes

Performance criteria	
Identify and specify opportunities for customer service improvement	
1	monitor developments in technology and the use of other resources to improve customer service
2	review customer service delivery systems with specific reference to use of resources and technology
3	identify opportunities and options for improving customer service by applying technology or other resources
4	analyse the customer service benefits that could result from options for improvement
5	specify the changes in technology or other resources needed to deliver the options
Evaluate options for applying technology or other resources to improve customer service	
6	identify the options for improving customer service with the application of technology or other resources
7	establish the costs associated with each option for improving customer service
8	list and where possible quantify the benefits from each option for improving customer service
9	estimate the affordability of each option to improve customer service
10	recommend the most appropriate options for implementation
11	identify the probable effects of any recommended changes on your organisation's service offer and customer perceptions
12	plan a business case to support your recommendations for improvements through application of technology or other resources

Performance criteria	
Oversee the implementation of resource changes to improve customer service	
13	plan implementation using details of agreed developments to improve customer service
14	brief colleagues about the implementation of customer service improvements and the expected benefits
15	monitor implementation of customer service improvements and the expected benefits
16	review implementation of customer service improvements with colleagues
17	make appropriate adjustments to implementation of customer service improvements as a result of review

Unit 25: Review and Re-Engineer Customer Service Processes

Unit code:	**CFACSD19**
SCQF level:	**8**
Credit points:	**11**

Unit summary

From time to time, a customer process must be subject to review. Most of all, this is because both customer service expectations and the external environment change. In addition to this, features of the process evolve as it is operated and the customer service purpose of various details can be lost.

This unit is about a systematic approach to reviewing and re-engineering a customer service process. The review seeks a balance of customer satisfaction, cost awareness and compliance with regulation. The review must be undertaken with the agreement and support of those with authority to make changes. It must also take account of the views of those who deliver the process and are in direct contact with customers.

This unit is for you if you are responsible for reviewing customer service processes. Do not use this unit if you do not hold that responsibility and do not have the support of those with authority to make changes.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Review; re-engineer; customer service processes; customer expectations; environmental change; cost awareness; compliance regulation; management; customer service; contact centres; developing; improving; communication; problem solving; behaviours

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Review and re-engineer customer service processes	
1	ways to establish boundaries around a customer service process to be re-engineered
2	who needs to be involved in the re-engineering process to ensure that the recommendations can be seen through
3	the importance of communicating with those involved in service delivery when re-engineering the process
4	ways to analyse and assess the effectiveness of separate steps in the customer service process
5	the importance of identifying the right questions to challenge existing customer service processes appropriately
6	techniques for implementing changes in customer service processes
7	the importance of monitoring the effects of customer service process changes

Performance criteria	
Scope the customer service processes to be reviewed	
1	define the boundaries of a customer service process
2	agree with the appropriate people the boundaries of the customer service process to be reviewed
3	set parameters for the types of change that might be made during the re-engineering
4	communicate with everybody involved regarding the aims of the review
Analyse the customer service process and identify improvement opportunities	
5	identify all the key steps in the customer service process
6	analyse each step in the customer service process in fine detail
7	assess each step in the customer service process with reference to customer satisfaction, costs and compliance with relevant regulation
8	raise questions about each step in the current process to establish where there is scope for development and improvement
9	explore all the questions raised with those involved in the process and their managers
10	identify options for re-engineering improvements that deserve further investigation

Performance criteria	
Evaluate improvement options and re-engineer service processes	
11	evaluate each option for re-engineering improvements that deserve further investigation
12	make and agree recommendations regarding each option that has been evaluated for re-engineering the customer service process
13	plan the implementation of agreed recommendations for re-engineering the customer service process
14	implement re-engineering of the customer service process
15	monitor the results of implementing re-engineering of the customer service process

Unit 26: Manage Customer Service Performance

Unit code:	**CFACSD20**
SCQF level:	**7**
Credit points:	**7**

Unit summary

Customer service performance can be measured by a wide variety of metrics and ratings collected in different ways by different organisations. Those measurements are needed if you are to be able to manage performance systematically and take positive actions for improvement. Information on performance must be collected and interpreted in order to identify appropriate management actions to promote improvement. This may involve reference to units, benchmarks, targets and tolerances and also the identification of trends and patterns in the evidence that is monitored.

This unit is about those monitoring and management processes.

This unit is for you if you have responsibility for the customer service performance of individuals or a team and you have the authority to see management actions through.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Management; customer service performance; metrics; ratings; measuring; performance measures; benchmarking; targets; identify trends; identify patterns; monitor outcomes; customer service; contact centres; developing; improving; communication; problem solving

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Manage customer service performance	
1	methods for collecting statistics on customer service operations performance
2	techniques for interpreting customer service performance statistics
3	the importance of setting targets that are SMART (Specific, Measurable, Achievable, Realistic, Time-bound)
4	sources of benchmarks and standards for customer service performance
5	techniques for identifying trends and patterns in customer service performance
6	options for management actions that will improve customer service performance
7	methods of coaching and training to improve customer service performance

Performance criteria	
Monitor performance in customer service operations	
1	collect regular statistics on customer service operations performance
2	interpret broad patterns of customer service operations statistics
3	investigate questions raised by interpretation and analysis of performance
4	interpret statistics regarding customer service performance in specific product and service areas
5	match customer service performance statistics to benchmarks, targets, standards or agreed tolerances
6	use customer service performance statistics to identify trends
7	compare customer service performance statistics with broader quality monitoring results
8	review resource provision to identify any resource changes needed to improve customer service performance management
Take management actions to improve performance in customer service operations	
9	identify management actions to maintain and improve on customer service performance
10	summarise monitoring evidence to support the case for management actions to improve performance
11	brief team members on changes they must make to improve customer service performance
12	organise resource changes needed to improve customer service performance
13	organise suitable coaching or training to improve customer service performance where development needs have been identified
14	adjust customer service performance targets which have ceased to be both challenging and achievable

Unit 27: Analyse and Report on the Content of Customer Service Feedback Posted on Social Media

Unit code:	**CFACSD21**
SCQF level:	**6**
Credit points:	**4**

Unit summary

For many organisations, important customer feedback can be found on social media platforms. Customers and influencers exchange opinions about the service they receive from organisations and those opinions may have a significant effect on those organisations' reputations. Sometimes communication through social media is an integral part of an organisation dealing with its customers. However, it also pays to monitor and review social media content more broadly in order to see patterns. This in turn may lead to suggestions for improvements to customer service and changes in the way an organisation deals with its customers.

This unit is about taking a structured approach to the process of analysing and reporting on feedback obtained through the social media. You should choose this unit if one part of your job role involves monitoring of that process.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Development and improvement; social media platforms; customer feedback

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Analyse and report on the content of customer service feedback posted on social media platforms	
1	random sampling techniques and how to evaluate bias in non-random sampling
2	principles of questionnaire design
3	how to search social media platforms for customer service feedback posted by customers
4	how to ensure that customer service feedback posted on social media platforms is accurate and valid
5	how to calculate the cost of a customer survey
6	how to use appropriate software to record and analyse customer feedback
7	methods of displaying and presenting data in a way that is easy to understand
8	statistical techniques for summarising trends and patterns
9	organisational procedures for recommending changes in your service offer or customer service procedures

Performance criteria
Collect and collate customer service feedback on social media platforms

1	search social media platforms for customer feedback
2	identify customer service feedback posted as social media by customers
3	select one or more methods for collecting customer feedback from social media platforms
4	record the data you collect in a way that makes analysis and interpretation easy
5	respect your customers' rights to confidentiality if they do not want their comments to be identified

Analyse customer service feedback gathered from social media platforms	
6	confirm that customer service feedback posted on social media is accurate and valid
7	classify and collate customer service feedback placed on social media platforms by customers
8	assemble and collate customer service feedback on social media given in response to specific requests
9	identify patterns and trends in customer service revealed by feedback from social media
10	calculate and summarise patterns and trends in feedback from customers using social media platforms
11	present your analysis in a form that is easily understood
12	link your analysis with your organisation's service offer and customer service processes
13	make recommendations about actions that may be appropriate in response to customer service feedback
14	respond to customers service feedback through social media platforms where this is appropriate

Unit 28: Develop a Customer Service Network through Social Media Platforms

Unit code:	**CFACSD22**
SCQF level:	**7**
Credit points:	**5**

Unit summary

Social media marketing represents a defined route for tackling all marketing activities using social media platforms. Especially where social media marketing is used, an organisation is likely to choose ongoing use of social media to deliver customer service both proactively and reactively. This involves establishing and maintaining an appropriate presence on commonly used social media platforms. It also involves dealing with customers through those platforms so that a social media community is linked directly with each other and with the organisation.

This unit is all about the customer service actions needed to maintain and develop a customer network using social media platforms as important channels of communication.

You should choose this unit if your customer service role includes a full and active involvement with social media platform uses for customer service.

Unit assessment requirements

There are no specific assessment requirements for this unit. Please refer to the overall *Skills CFA Assessment Strategy* in *Annexe A*.

Terminology

Social media marketing; development and improvement; social media platforms; customer service

Assessment outcomes and standards

To pass this unit, the candidate needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the candidate is expected to meet to achieve the unit.

Knowledge and understanding	
Develop a customer service network through social media platforms	
1	how to analyse customer service processes
2	your organisation's service offer, services or products
3	the mainstream and niche social media platforms used by customers
4	how organisations use social media platforms for customer service
5	how to profile customers who use particular social media platforms
6	the importance of making an impact on social media communications
7	how social media communications work
8	regulations relating to the use of social media
9	ways to develop improvements in the use of social media for customer service delivery
10	the importance of teamwork when seeking to devise and implement customer service improvements using social media
11	how to devise and present procedures for providing customer service using social media
12	how to select the data required for monitoring and observing improvements to customer service using social media
13	how to monitor the effects of improvements to customer service when observing social media data
14	metrics that may be used to monitor improvements to customer service using social media

Performance criteria
Identify and develop customer service processes that can be enhanced using social media

1	analyse customer service processes that are essential to your organisation's service offer, services or products
2	identify social media platforms which are most likely to be used by your organisation's customers
3	research the ways in which your organisation and others currently use social media platforms for customer service
4	draw up a profile of how your customers and potential customers use social media platforms
5	identify social media communities that are relevant to your organisation's customer service processes
6	draw up profiles of the social media communities that are relevant to your organisation's customer service processes
7	identify and define improvements that could be made to your organisation's use of social media for customer service
8	check your proposed improvements comply with regulation relating to the use of social media
Manage ongoing delivery of customer service using social media	
9	plan enhanced use of social media to deliver customer service using data gathered when reviewing existing social media uses
10	work with colleagues to allocate responsibilities for making improvements to social media use for customer service
11	contribute to the development of procedures for providing customer service to customers and social media communities
12	contribute to the implementation of improvements in customer service using social media
13	monitor the effects of improvements to customer service using social media
14	review use of social media for delivery of customer service using data collected through monitoring to identify further improvements

13 Further information and useful publications

To get in touch with us, visit our 'Contact us' page:

- Edexcel, BTEC and Pearson Work Based Learning contact details: qualifications.pearson.com/en/support/contact-us.html

- books, software and online resources for UK schools and colleges: www.pearsonschoolsandfecolleges.co.uk

Key publications:

- *Adjustments for candidates with disabilities and learning difficulties – Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications* (Joint Council for Qualifications (JCQ))

- *Equality Policy* (Pearson)

- *Recognition of Prior Learning Policy and Process* (Pearson)

- *UK Information Manual* (Pearson)

- *UK Quality Vocational Assurance Handbook* (Pearson)

All of these publications are available on our website.

Further information and publications on the delivery and quality assurance of SVQ/Competence-based qualifications are available on our website, qualifications.pearson.com

Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, go to the resources page on our website, qualifications.pearson.com

14 Professional development and training

Professional development and training

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

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

● planning for the delivery of a new programme

● planning for assessment and grading

● developing effective assignments

● building your team and teamwork skills

● developing candidate-centred learning and teaching approaches

● building in effective and efficient quality assurance systems.

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

Training and support for the lifetime of the qualifications

To get in touch with our dedicated support teams please visit our website, qualifications.pearson.com

Online support: find the answers to your questions by browsing over 100 FAQs on our website or by submitting a query using our Work Based Learning Ask the Expert Service. You can search the database of commonly asked questions relating to all aspects of our qualifications in the work-based learning market. If you are unable to find the information you need, send us your query and our qualification or administrative experts will get back to you. The Ask the Expert service is available on our website, qualifications.pearson.com

Online forum

Pearson Work Based Learning Communities is an online forum where employers, further education colleges and workplace training providers can seek advice and clarification about any aspect of our qualifications and services, and share knowledge and information with others. The forums are sector-specific and cover business administration, customer service, health and social care, hospitality and catering and retail. The online forum is on our website, qualifications.pearson.com

15 Contact us

We have a dedicated Account Support team, across the UK, to give you more personalised support and advice. To contact your Account Specialist:

Email: wblcustomerservices@pearson.com
Telephone: 0844 576 0045

If you are new to Pearson and would like to become an approved centre, please contact us by:

Email: wbl@pearson.com
Telephone: 0844 576 0045

Complaints and feedback

We are working hard to give you excellent service. However, if any element of our service falls below your expectations, we want to understand why so that we can prevent it from happening again. We will do all that we can to put things right.

If you would like to register a complaint with us, please email wblcomplaints@pearson.com

We will formally acknowledge your complaint within two working days of receipt and provide a full response within seven working days.

Skills CFA

Assessment Strategy

Competence Units (S/NVQ)

Business Administration

Customer Service SVQs

Management and Leadership

April 2015

Contents

1. Introduction

This Assessment Strategy provides principles and guidance to awarding organisations for the assessment of competence-based units and qualifications (including Scottish Vocational Qualifications and National Vocational Qualifications) within Business Administration, Customer Service and Management and Leadership in England, Scotland, Wales and Northern Ireland.

This document outlines Skills CFA principles in regards to:

● external quality control of assessment

● requirements of assessor and verifiers

● evidence

● employer direct model.

These principles are in addition to the generic criteria that awarding organisations must meet for delivery of qualifications as required by the qualification regulators, for example Ofqual's *Regulatory Arrangements for the Qualifications and Credit Framework* and any regulatory requirements specified by the SQA Accreditation.

This strategy should only be used for the assessment of the Business Administration, Customer Service and Management and Leadership competence-knowledge based units and qualifications owned by Skills CFA. Units which have been imported by Skills CFA into their apprenticeships or competence-based qualifications will be assessed in compliance with their relevant assessment strategies. Awarding organisations may assess knowledge-only units as they see fit.

2. External quality control of assessment

The quality of the assessment process is the responsibility of awarding organisations. However, Skills CFA encourages flexibility and innovation of approach, alongside robust systems to support quality control. Awarding organisations are also encouraged to detail their approach to external verification, risk assessment and data requests.

2.1   External verification

- Awarding organisations are responsible for the competence of external verifiers. It is the responsibility of awarding organisations to monitor centres' performance in accordance with regulatory requirements.

- Awarding organisations must consistently apply external verification processes at all assessment centres delivering competence-based qualifications. These should be underpinned by standard risk assessment and risk management processes.

2.2   Risk assessment

- Awarding organisations must carry out standard risk assessments for all qualification assessment centres that are delivering competence-based qualifications. Identified risks must be managed appropriately.

- Awarding organisations must retain evidence to prove that a risk assessment has been carried out for each approved centre, and that a strategy to minimise any identified risk has been implemented.

2.3   Data requests

- Each quarter, awarding organisations must provide registration and achievement data at all qualification levels and unit levels (where possible) to Skills CFA.

3. Requirements of assessors, EQAs and IQAs

Candidates may be assessed, moderated or verified at work by several appointed individuals.

3.1 Assessors

The primary responsibility of an assessor is to assess candidates' performance in a range of tasks and to ensure the evidence submitted by the candidate meets the requirements of the assessment criteria.

It is important that an assessor can recognise occupational competence as specified by the national standard. Assessors therefore need to have a thorough understanding of assessment and quality assurance practices, as well as have in-depth technical understanding related to the qualifications for which they are assessing candidates.

To be able to assess candidates, assessors must:

● be 'occupationally competent'. Assessors must provide current evidence of competence, knowledge and understanding in the areas to be assessed. This will normally be achieved through demonstrating competence in the roles which are to be assessed or demonstrated by relevant experience and continuing professional development (CPD) which may include the achievement of qualifications relevant to the areas being assessed;

AND ONE OF EITHER OF THE FOLLOWING

● hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to assess candidates undertaking competence-based units and qualifications. Assessors holding older qualifications must be able to demonstrate that they are assessing to the current standards;

OR

● be working toward an appropriate qualification, as specified by the appropriate regulatory authority. Any assessors working towards an appropriate qualification must ensure their decisions are countersigned by a suitably-qualified assessor/verifier and should be supported by a qualified assessor throughout their training period; AND have a full and current understanding of the units of competence and requirements of the qualifications being assessed, including the quality of assessment and the assessment process.

It is the responsibility of approved centres to select and appoint assessors.

3.2 External quality assurer (EQA)[1]

The primary responsibility of EQAs is to assure quality of internal verification and assessments across the centres for which they are responsible. EQAs must have a thorough understanding of quality assurance and assessment practices, as well as in-depth technical knowledge related to the qualifications that they are externally verifying.

EQAs must:

- be 'occupationally competent'. EQAs must demonstrate sufficient and current understanding of the qualifications to be verified, and know how they are applied in business;

AND ONE OF EITHER OF THE FOLLOWING

- hold an appropriate qualification as specified by the appropriate regulatory authority, confirming their competence to verify competence-based assessments. EQAs holding older qualifications must be able to demonstrate that they are verifying to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If EQAs are working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified EQA[2] and should be supported by a qualified EQA throughout their training period; **AND** demonstrate competent practice in external verification of assessment, and demonstrate understanding of the principles and practices of external verification of assessment, including the quality of assessment and the assessment process.

It is the responsibility of the awarding body to select and appoint EQAs.

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[1] Also known as External Verifier (EV)

[2] The need for countersigning the decisions of EQAs working towards a qualification applies to England and Wales and Scotland

3.3 Internal quality assurer (IQA)[3]

A primary responsibility of IQAs is to assure the quality and consistency of assessments by the assessors for whom they are responsible. IQAs therefore need to have a thorough understanding of quality assurance and assessment practices, as well as sufficient technical understanding related to the qualifications that they are internally verifying. It will be the responsibility of the approved centre to select and appoint IQAs.

IQAs must:

● be 'occupationally competent'. IQAs must demonstrate sufficient and current understanding of the qualifications to be internally verified, and know how they are applied in business;

AND ONE OF EITHER OF THE FOLLOWING

● hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to internally verify competence-based assessments and candidates. IQAs holding older qualifications must be able to demonstrate that they are verifying to the current standards;

OR

● be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If an IQA is working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified IQA[4] and should be supported by a qualified IQA throughout their training period; AND demonstrate competent practice in internal verification of assessment, and demonstrate understanding of the principles and practices of internal verification of assessment, including the quality of assessment and the assessment process.

Skills CFA and awarding organisations require all assessors, moderators and verifiers to maintain current Business Administration, Customer Service and Management and Leadership competence to deliver these functions. Skills CFA recognises this can be achieved in many ways. However, such information must be formally recorded in individual CPD records that are maintained in assessment centres.

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[3] Also known as Internal Verifier (IV)

[4] The need for countersigning the decisions of IQAs working towards a qualification applies to England and Wales and Scotland

4. Evidence

4.1 Evidence from workplace performance

- Evidence of occupational competence of all competence units at any level, should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria of the (QCF) competence units.

- These conditions would be those typical to the candidate's normal place of work. The evidence collected under these conditions should also be as naturally occurring as possible. It is accepted that not all employees have identical workplace conditions and, therefore, there cannot be assessment conditions that are identical for all candidates. However, assessors must ensure that, as far as possible, the conditions for assessment should be those under which the candidate usually works.

4.2 Simulation

- Simulation can be applied to all QCF units listed in *Appendix B*.

- Where simulation is used for QCF units at Level 2 and above, it should only form a small part of the evidence for the qualification.

- Evidence may be produced through simulation solely in exceptional circumstances. The exceptional circumstances, under which simulation is possible, are those situations that are not naturally or readily occurring, such as response to emergencies.

- Simulation must be undertaken in a 'realistic working environment' (RWE). An RWE is 'an environment which replicates the key characteristics in which the skill to be assessed is normally employed'. The RWE must provide conditions the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Guidelines for using RWE can be found in *Appendix A.*

- Simulation can also be used for SVQs. However, where simulation is used for SVQ units, it should only be for small parts of the units (at any level), in exceptional circumstances only, and undertaken in RWE.

5. Employer direct model

The employer direct model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process. Under this model, the employer, with the agreement of their awarding organisation, may choose between:

● achieving the appropriate regulatory body approved unit qualifications for assessment;

OR

● demonstrating that the employer's training and development activity undertaken to prepare, validate and review these assessment roles, maps 100% to the National Occupational Standards which these qualifications are based on. The mapping process must be agreed by the awarding organisation as providing the equivalent level of rigour and robustness as achievement of the unit qualification.

In order to use the employer direct model:

● **An organisation must:**

   o have staff who have achieved, or be working towards achieving, appropriate regulatory body approved unit qualifications for assessment, moderation or verification;

OR

   o seek guidance and approval from an awarding organisation to demonstrate that they have:

      ▪ appropriate processes in place to facilitate assessment, moderation or verification functions

      ▪ carry out 100% mapping of the trainer, supervisor or managers' assessment, moderation or verification skills and knowledge to the National Occupational Standards upon which the qualifications above are based.

● **An awarding organisation must:**

   o offer this model to employers only

   o supply information on the requirements for internal and external moderation/verification activities to assessment centres.

Appendix A – Realistic working environment guidelines

Realistic working environment (RWE) can be applied to all the units in *Appendix B.*

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

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

1. the RWE is managed as a real work situation

2. assessment must be carried out under realistic business pressures

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

4. candidates must be expected to achieve a volume of work comparable to normal business practices

5. the range of services, products, tools, materials and equipment that the candidates use must be up to date and available

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

7. candidates must be given workplace responsibilities to enable them to meet the requirements of the units

8. customer perceptions of the RWE is similar to that found in the work situation being represented

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

Appendix B – Simulation: a list of QCF units

Simulation can be applied to the following competence units only.

Business Administration

Skills CFA Ref.	Unit title	Level
B&A 3	Work with Others in a Business Environment	1
B&A 4	Health and Safety in a Business Environment	1
B&A 5	Manage Time and Workload	1
B&A 6	Use a Telephone and Voicemail System	1
B&A 7	Prepare Text from Notes	1
B&A 8	Meet and Welcome Visitors in a Business Environment	1
B&A 9	Handle Mail	1
B&A 10	Use Office Equipment	1

Customer Service

Skills CFA Ref.	Unit title	Level
CS 2	Communication in Customer Service	1
CS 3	Record Details of Customer Service Problems	1
CS 4	Deal with Customer Queries, Requests and Problems	1

Management and Leadership

Skills CFA Ref.	Unit title	Level
M&L 17	Manage Conflict within a Team	3
M&L 31	Discipline and Grievance Management	4
M&L 44	Manage Redundancy and Redeployment	4