

# SVQ2 in Front of House at SCQF Level 5

## Candidate Logbook

SVQ

April 2013

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# Section 1: SVQ2 in Front of House at SCQF Level 5

## Introduction

This document contains information specific to the SVQ2 in Front of House at SCQF Level 5.

## National Occupational Standards and SVQs

The standards, Assessment Strategy and qualification structures for hospitality are owned by People 1<sup>st</sup> Sector Skills Council, who reviewed these National Occupational Standards. The SVQs have been developed from the National Occupational Standards.

The SVQ2 in Front of House at SCQF Level 5 gives recognition of candidates' skills, knowledge and understanding. It allows candidates to gain a qualification in the workplace that relates to their job and promotes good working practice.

You can contact the Sector Skills Council (SSC) at:

People 1<sup>st</sup>  
2nd Floor, Armstrong House  
38 Market Square  
Uxbridge  
UB8 1LH

Telephone: 01895 817000

Website: [www.people1st.co.uk](http://www.people1st.co.uk)

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

Simulation must be carried out in conditions resembling the workplace. These conditions are described as being a 'realistic working environment' (RWE).

## Which SVQ in Front of House is available?

SVQ2 in Front of House at SCQF Level 5

## Who is this SVQ for?

This qualification is suitable for many hotel staff, particularly those in small hotels, guest houses and B&Bs, and for those who are employed as receptionists in larger hotels. It may also be suitable for receptionists employed to do similar tasks in other establishments, such as care homes or private hospitals.

## What is the structure of the SVQ2 in Front of House at SCQF Level 5

To achieve the whole qualification at Level 5, you must prove competence in three **mandatory units** and seven **optional units**.

This comprises:

- all of the mandatory units
- at least one unit from Group A.

The remaining six units can come from either Group A or B.

### Mandatory units for the SVQ2 in Front of House at SCQF Level 5

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

Unit number	Unit code	Title	Unit credit	SCQF level
1	1GEN1/09	Maintain a safe, hygienic and secure working environment	3	4
2	1GEN4/09	Work effectively as part of a hospitality team	3	4
3	2GEN1/10	Give customers a positive impression of yourself and your organisation (ICS)	5	5

## Optional units for the SVQ2 in Front of House at SCQF Level 5

You must achieve **at least one from Group A**. The remaining units can come from either Group A or Group B.

### Group A

Unit number	Unit code	Title	Unit credit	SCQF level
4	2FOH1/10	Deal with communications as part of the reception function	3	5
5	2FOH2/10	Deal with the arrival of customers	4	5
6	2FOH3/10	Deal with bookings	4	5
7	2FOH4/10	Prepare customer accounts and deal with departures	4	5
8	2FOH11/10	Provide tourism information services to customers	5	5

### Group B

Unit number	Unit code	Title	Unit credit	SCQF level
9	2FOH5/10	Produce documents in a business environment (CfA)	4	5
10	2FOH6/10	Use office equipment (CfA)	3	4
11	2FOH7/10	Prepare to communicate in a business environment (CfA)	3	5
12	2FOH8/10	Handle mail and book external services	3	5
13	2FOH9/10	Provide reception services (CfA)	3	5
14	2FOH10/10	Store and retrieve information (CfA)	3	5
15	2GEN5/10	Resolve customer service problems (ICS)	6	5
16	2GEN6/10	Promote additional services or products to customers (ICS)	6	5
17	2GEN7/10	Deal with customers across a language divide (ICS)	8	5
18	2GEN8/10	Maintain customer service through effective handover (ICS)	4	5
19	2GEN9/10	Maintain and deal with payments	4	5



# Section 2: Examples of forms

## Collecting your evidence

This section contains examples of the forms you, your assessor and the internal verifier will use while you are undertaking your SVQ2 in Front of House at SCQF Level 5.

The forms are:

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

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



## Example form 1 – Portfolio title page

<b>Name:</b>	
<b>Job title:</b>	
<b>Name of employer/training provider/college:</b>	
<b>Their address:</b>	
<b>Postcode:</b>	
<b>Telephone number (Home):</b>	<b>(Work):</b>
<b>Email address:</b>	<b>Fax number:</b>
<b>SVQ:</b>	
<b>Level:</b>	
<b>Units submitted for assessment:</b>	
<b>Mentor/Supervisor:</b>	
<b>(Please provide details of mentor's/supervisor's experience):</b>	
<b>Assessor:</b>	<b>Date:</b>



## Example form 2 – Personal profile

<b>Name:</b>	
<b>Address:</b>	
<b>Postcode:</b>	
<b>Telephone number (Home):</b>	<b>(Work):</b>
<b>Email address:</b>	<b>Fax number:</b>
<b>Job title:</b>	
<b>Relevant experience</b>	
<b>Description of your current job:</b>	
<b>Previous work experience or attach copy of a current CV:</b>	
<b>Qualifications and training and/or attach copy of a current CV:</b>	

*continued overleaf...*

**Voluntary work/interests:**

**Name of employer/training provider/college:**

**Address:**

**Postcode:**

**Telephone number (work):**

**Fax number:**

**Email address:**

**Type of business, if employer:**

**Number of staff:**

**Structure of organisation (including chart or diagram if available):**

### Example form 3 – Contents checklist

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



**Example form 4 – Index of evidence**

<b>SVQ title and level:</b>				
<b>Candidate:</b>				
<b>Units/ elements evidence links to</b> <i>(give specific numbers, eg 5.2.1)</i>	<b>Evidence number</b>	<b>Description of evidence</b>	<b>Included in portfolio (Yes/No)</b> <i>If No, state location</i>	<b>Internal verifier signature and date of sampling</b>



Example form 5 – Unit assessment plan

<b>SVQ title:</b>				
<b>Unit:</b>				
<b>Candidate:</b>			<b>Assessor:</b>	
<b>Normal working activities performed</b>				
	<b>Typical evidence</b>	<b>Work area</b>	<b>Expected completion date</b>	<b>Links to other units/elements</b>
Element:				
Element:				
Element:				
<b>Activities needing to be performed</b>				
Element:				
Element:				
Element:				
<b>Additional comments</b>				
<b>Assessor's signature:</b>			<b>Date:</b>	
<b>Candidate's signature:</b>			<b>Date:</b>	



**Example form 6 – Unit sign-off record**

<b>SVQ title and level:</b>									
<b>Candidate:</b>									
<b>Assessor:</b>									
To achieve the whole qualification, you must prove competence in three <b>mandatory</b> units and seven <b>optional</b> units.									
<b>Unit checklist:</b> list here the units you will be undertaking, then circle the reference number of each unit as you complete it.									
<b>Mandatory</b>									
<b>Optional</b>									

<b>Mandatory units</b>			
<b>Unit number</b>	<b>Title</b>	<b>Assessor’s signature</b>	<b>Date</b>

*continued overleaf...*

<b>Optional units</b>			
<b>Unit number</b>	<b>Title</b>	<b>Assessor's signature</b>	<b>Date</b>

Example form 7 – Work log

<b>SVQ title and level:</b>				
<b>Unit/element(s):</b>				
<b>Candidate:</b>				
<b>Purpose of statement:</b>				
<b>Evidence index number:</b>				
<b>Date</b>	<b>Evidence index number</b>	<b>Details of statement</b>	<b>Links to other evidence</b> <i>(enter numbers)</i>	<b>Units, elements and PCs covered</b>
<b>Candidate's signature:</b>			<b>Date:</b>	
<b>Assessor's signature:</b>			<b>Date:</b>	



Example form 8 – Observation record

<b>SVQ title and level:</b>	
<b>Unit/element(s):</b>	
<b>Candidate:</b>	<b>Date of observation:</b>
<b>Evidence index number:</b>	
<b>Skills/activities observed:</b>	<b>PCs and range covered:</b>
<b>Knowledge and understanding apparent from this observation:</b>	
<b>Other units/elements to which this evidence may contribute:</b>	
<b>Assessor comments and feedback to candidate:</b>	
I can confirm the candidate's performance was satisfactory.	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>



Example form 9 – Witness testimony

<b>SVQ title and level:</b>	
<b>Candidate name:</b>	
<b>Evidence index number:</b>	
<b>Where applicable, evidence number to which this testimony relates:</b>	
<b>Unit:</b>	
<b>Element(s):</b>	
<b>Range:</b>	
<b>Date of evidence:</b>	
<b>Witness name:</b>	
<b>Relationship to candidate:</b>	
<b>Details of testimony:</b>	
I can confirm the candidate's evidence is authentic and accurate.	
<b>Witness signature:</b>	
<b>Name:</b>	<b>Date:</b>
<b>Contact telephone number:</b>	
<i>Please tick (✓) the appropriate box.</i>	
<input type="checkbox"/>	<b>Qualified as an assessor for workplace performance</b>
<input type="checkbox"/>	<b>Familiar with the SVQ standards to which the candidate is working</b>



Example form 10 – Expert witness evidence record

<b>SVQ title and level:</b>	
<b>Candidate name:</b>	
<b>Evidence index number:</b>	
<b>Where applicable, evidence number to which this testimony relates:</b>	
<b>Unit:</b>	
<b>Element(s):</b>	
<b>Date of evidence:</b>	
<b>Expert witness name:</b>	
<b>Relationship to candidate:</b>	
<b>Details of testimony:</b>	
I can confirm the candidate's evidence is authentic and accurate.	
<b>Expert witness signature:</b>	
<b>Name:</b>	<b>Date:</b>
<b>Contact telephone number:</b>	

<i>Please tick (✓) the appropriate box.</i>	
<input type="checkbox"/>	<b>Qualified as an assessor for workplace performance</b>
<input type="checkbox"/>	<b>Relevant professional work role that involves evaluating everyday staff practice</b>
<input type="checkbox"/>	<b>Current expertise</b>
<input type="checkbox"/>	<b>Familiar with the SVQ standards to which the candidate is working</b>



## Example form 11 – Record of questions and candidate’s answers

<b>SVQ title and level:</b>	
<b>Candidate name:</b>	
<b>Unit:</b>	<b>Element(s):</b>
<b>Evidence index number:</b>	
<b>Circumstances of assessment:</b>	
<b>List of questions and candidate’s responses:</b>	
<b>Q:</b>	
<b>A:</b>	
<b>Q:</b>	
<b>A:</b>	
<b>Assessor’s signature:</b>	<b>Date:</b>
<b>Candidate’s signature:</b>	<b>Date:</b>



## Section 3: Logbook

	<b>Page number</b>
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Unit 18: Maintain customer service through effective handover	305
Unit 19: Maintain and deal with payments	321



# Mandatory units



# **Unit 1: Maintain a safe, hygienic and secure working environment**

**Unit code:** 1GEN1/09

**Unit credit:** 3

**SCQF Unit level:** 4

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## **Introduction**

This unit is about basic health, hygiene, safety and security. This includes maintaining a clean and hygienic personal appearance, getting any cuts and grazes treated and reporting illnesses and infections. The unit also covers safety and security in your workplace, helping to spot and deal with hazards and following emergency procedures when necessary.

This unit links to all of the units in the hospitality suite of occupational standards.

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
For the whole unit		
K1 Your responsibilities under the Health and Safety at Work Act		
K2 Why it is important to work in a healthy, safe and hygienic way		
K3 Where you can get information about health, hygiene and safety in your workplace		
For Element 1GEN1/09.1 Maintain personal health and hygiene		
K4 General rules on hygiene that you must follow		
K5 Why correct clothing, footwear and headgear should be worn at all times		
K6 Why it is important to maintain good personal hygiene		
K7 What you should do if you have cuts, grazes and wounds and why it is important		
For Element 1GEN1/09.2 Help to maintain a hygienic, safe and secure workplace		
K8 The types of hazards that you may find in your workplace and how to deal with these correctly		
K9 Hazards you can deal with yourself and hazards that you must report to someone else		
K10 How to warn other people about hazards and why this is important		
K11 Why you should report accidents and near accidents and who you should report these to		
K12 Types of emergencies that may happen in your workplace and how to deal with these		
K13 Where to find first aid equipment and who the registered first-aider is in your workplace		
K14 Safe lifting and handling techniques that you must follow		
K15 Other ways of working safely that are relevant to your job and why these are important		
K16 Your organisation's emergency procedures, in particular for fire, and how you should follow these		
K17 The possible causes of fire in your workplace		
K18 What you can do to minimise the risk of fire		

<b>Knowledge</b>	<b>Type of evidence</b>	<b>Date</b>
<p>For Element 1GEN1/09.2 Help to maintain a hygienic, safe and secure workplace</p> <p>K19 Where to find fire alarms and how to set them off</p> <p>K20 Why you should never approach a fire unless it is safe to do so</p> <p>K21 Why it is important to follow fire safety laws</p> <p>K22 Your organisation's security procedures and why these are important</p> <p>K23 The correct procedures for dealing with customer property</p> <p>K24 Why it is important to report all usual/non-routine incidents to the appropriate person</p>		

**Additional evidence (if applicable):**

--

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this unit is my own work and meets the requirements of the National Occupational Standards.

Candidate signature:

Date:

I confirm that the candidate has achieved all the requirements of this unit.

Assessor signature:

Date:

Countersigning assessor signature (if applicable):

Date:

I confirm that the candidate's sampled work meets the standards specified for this unit and may be presented for external verification.

Internal verifier signature:

Date:

Countersigning internal verifier (if applicable):

Date:

## Element 1GEN1/09.1

### Maintain personal health and hygiene

#### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
1 Wear clean, smart and appropriate clothing, footwear and headgear									
2 Keep your hair neat and tidy and wear it in line with your organisation's standards									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
3 Make sure any jewellery, perfume and cosmetics you wear are in line with your organisation's standards									
4 Get any cuts, grazes and wounds treated by the proper person									
5 Report illness and infections promptly to the proper person									

**Additional evidence (if applicable):**

--

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this unit is my own work and meets the requirements of the National Occupational Standards.

Candidate signature:

Date:

I confirm that the candidate has achieved all the requirements of this unit.

Assessor signature:

Date:

Countersigning assessor signature (if applicable):

Date:

I confirm that the candidate's sampled work meets the standards specified for this unit and may be presented for external verification.

Internal verifier signature:

Date:

Countersigning internal verifier (if applicable):

Date:

## Element 1GEN1/09.2

### Help to maintain a hygienic, safe and secure workplace

#### What you must cover

##### **C1 Hazards** (at least **one** from)

- a) relating to equipment
- b) relating to areas where you work
- c) relating to personal clothing

##### **C2 Ways of dealing with hazards (None from)**

- a) putting them right yourself
- b) reporting them to appropriate colleagues
- c) warning other people

##### **C3 Emergency procedures** (at least **one** from)

- a) fire
- b) threat
- c) security

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
6 Keep a look out for hazards in your workplace									
7 Identify any hazards or potential hazards and deal with these correctly									
8 Report any accidents or near accidents quickly and accurately to the proper person									
9 Follow health, hygiene and safety procedures in all your work									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
10 Practise emergency procedures correctly									
11 Follow your organisation's security procedures									

**Element: 1GEN1/09.2 Help to maintain a hygienic, safe and secure workplace**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C1.Hazards</b>									
a	Relating to equipment								
b	Relating to areas where you work								
c	Relating to personal clothing								
<b>C2.Ways of dealing with hazards</b>									
a	Putting them right yourself								
b	Reporting them to appropriate colleagues								
c	Warning other people								
<b>C3.Emergency procedures</b>									
a	Fire								
b	Threat								
c	Security								

**Additional evidence (if applicable):**

<p><b>Column key:</b></p>	<p><b>O = direct observation of the learner's performance by their assessor</b></p>	<p><b>PD = professional discussion</b></p>
	<p><b>Q&amp;A = outcomes from oral or written questioning</b></p>	<p><b>A = assignment, project/case studies</b></p>
	<p><b>P = products of the learner's work</b></p>	<p><b>WT = authentic statements/witness testimony</b></p>
	<p><b>RA = personal statements and/or reflective accounts</b></p>	<p><b>EPW = expert witness testimony</b></p>
	<p><b>S = outcome from simulation, where permitted by the assessment strategy</b></p>	<p><b>RPL = evidence of recognition of prior learning</b></p>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational Standards.

Candidate signature:

Date:

I confirm that the candidate has achieved all the requirements of this Unit.

Assessor signature:

Date:

Countersigning assessor signature (if applicable):

Date:

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

Internal verifier signature:

Date:

Countersigning internal verifier (if applicable):

Date:



## **Unit 2: Work effectively as part of a hospitality team**

**Unit code:** 1GEN4/09

**Unit credit:** 3

**SCQF Unit level:** 4

---

### **Introduction**

This unit is about making a useful contribution to the work of a team, that is the people you work with. 'Team' includes your line manager or supervisor as well as other people in your team working at the same level as yourself. The unit includes accurately following instructions; working on time; helping others when they need help; communicating with the people you work with; getting feedback on what you do well and where you could improve and continuing to learn and develop yourself.

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
Plan and organise your work		
K1 Why it is essential to understand the requirements of the work K2 The benefits to you and your team of planning and organising your work K3 How to make the most efficient use of your time and avoid things that may unnecessarily disrupt it K4 The benefits of keeping everything you need for your work organised and available K5 Why it is important to keep your work area clean and tidy K6 Why it is important to keep waste to a minimum K7 When to ask for help and who you can ask		
Work effectively with team members		
K8 Why effective teamwork is important K9 The people in your team and how they fit into the organisation K10 The responsibilities of the team and why it is important to the organisation as a whole K11 How to maintain good working relationships with team members K12 How to determine if helping a team member will prevent you from completing your own work on time K13 The limits of your job role and what you can and cannot do when helping team members K14 What could be essential information that needs to be passed on to a team member and why you need to pass it on as soon as possible K15 The types of behaviour that help the team to work well and the types that do not K16 Why you should report any problems with working relationships to your line manager K17 How to communicate clearly and why it is important		

Knowledge	Type of evidence	Date
Develop your own skills		
K18 Why it is important to improve your knowledge and skills		
K19 How to get feedback from team members and how this can help you		
K20 How a learning plan should help to improve your work		
K21 Why it is important to review your action/learning plan regularly		

**Additional evidence (if applicable):**

<p><b>Column key:</b></p>	<p><b>O = direct observation of the learner's performance by their assessor</b></p>	<p><b>PD = professional discussion</b></p>
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Date:

## Plan and organise your work 1GEN4/09.1

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
1 Make sure you understand the requirements of the work									
2 Ask questions about things you do not understand									
3 Accurately follow instructions									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
4 Plan your work by prioritising tasks in order of importance									
5 Keep everything you need for your work organised and available									
6 Keep your work area as clean and tidy as possible									
7 Keep waste to a minimum									
8 Ask for help from the relevant person if you need it									
9 Provide work on time and as agreed									

**Additional evidence (if applicable):**

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## Work effectively with team members 1GEN4/09.2

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
10 Give team members help when they ask for it									
11 Make sure the help you give them is within the limits of your job role									
12 Make sure the help you give does not prevent you from completing your own work on time									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
13 Pass on important information to team members as soon as possible									
14 Maintain good working relationships with team members									
15 Report any problems with working relationships to the relevant person									
16 Communicate clearly and effectively with team members									

**Additional evidence (if applicable):**

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Date:

## Develop your own skills 1GEN4/09.3

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
17 Seek feedback on your work and deal with this feedback positively									
18 Identify, with the relevant person, aspects of your work which are up to standard and areas that you could improve									
19 Agree what you have to do to improve your work									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
20 Agree an action/ learning plan with the relevant person									
21 Seek opportunities to review and develop your plan									

**Additional evidence (if applicable):**

--

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**Unit 3:** **Give customers a positive impression of yourself and your organisation (ICS)**

Unit code: 2GEN1/10

Unit credit: 5

SCQF Unit level: 5

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**Introduction**

This unit is about communicating with customers to give a positive impression of yourself and your organisation. It involves giving customers the right impression, responding to their needs and providing helpful information.

This unit is Unit A4 from the Institute of Customer Service suite of standards.

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

<b>Knowledge</b>		<b>Type of evidence</b>
For the whole unit		
K1	Your organisation's standards for appearance and behaviour	
K2	Your organisation's guidelines for how to recognise what your customer wants and respond appropriately	
K3	Your organisation's rules and procedures regarding the methods of communication you use	
K4	How to recognise when a customer is angry or confused	
K5	Your organisation's standards for timeliness in responding to customer questions and requests for information	

**Additional evidence (if applicable):**

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<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Date:

## Establish effective rapport with customers 2GEN1/10.1

### What you must cover

#### **C1 Communication method** (at least **3** from)

- (a) face to face
- (b) in writing
- (c) by telephone
- (d) by text message
- (e) by e-mail (including social networking)
- (f) Intranet

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
1 Meet your organisation's standards of appearance and behaviour									
2 Greet your customer respectfully and in a friendly manner									
3 Communicate with your customer in a way that makes them feel valued and respected									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
4 Identify and confirm your customer's expectations									
5 Treat your customer courteously and helpfully at all times									
6 Keep your customer informed and reassured									
7 Adapt your behaviour to respond effectively to different customer behaviour									

**Element: 2GEN1/10.1 Establish effective rapport with customers**

**What you must cover:**

**(Assessor to record range with reference to element requirements)**

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C1.Hazards</b>									
a	face to face								
b	in writing								
c	by telephone								
d	by text message								
e	by email (including social networking)								
f	Intranet								

**Additional evidence (if applicable):**

<p><b>Column key:</b></p>	<p><b>O = direct observation of the learner's performance by their assessor</b></p> <p><b>Q&amp;A = outcomes from oral or written questioning</b></p> <p><b>P = products of the learner's work</b></p> <p><b>RA = personal statements and/or reflective accounts</b></p> <p><b>S = outcome from simulation, where permitted by the assessment strategy</b></p>	<p><b>PD = professional discussion</b></p> <p><b>A = assignment, project/case studies</b></p> <p><b>WT = authentic statements/witness testimony</b></p> <p><b>EPW = expert witness testimony</b></p> <p><b>RPL = evidence of recognition of prior learning</b></p>
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## Respond appropriately to customers 2GEN1/10.2

### What you must cover

#### **C2 Positive impression (all from)**

- (a) during routine delivery of customer service
- (b) during a busy time in your job
- (c) during a quiet time in your job
- (d) when people, systems or resources have let you down

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
8 Respond promptly to a customer seeking help									
9 Choose the most appropriate way to communicate with your customer									
10 Check with your customer that you have fully understood their expectations									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
11 Respond promptly and positively to your customers' questions and comments									
12 Allow your customer time to consider your response and give further explanation when appropriate									

**Element: 2GEN1/10.2 Respond appropriately to customers**

**What you must cover:**

**(Assessor to record range with reference to element requirements)**

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C2 Positive impression</b>									
a	During routine of customer service								
b	During a busy time in your job								
c	During a quiet time in your job								
d	When people, systems or resources have let you down								

**Additional evidence (if applicable):**

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<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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## Communicate information to customers 2GEN1/10.3

### What you must cover

#### **C3 Communicate with customers** (all from)

- (a) using appropriate spoken or written language
- (b) applying the conventions and rules appropriate to the method of communication you have chosen

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
13 Quickly find information that will help your customer									
14 Give your customer information they need about the services or products offered by your organisation									
15 Recognise information that your customer might find complicated and check whether they fully understand									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
16 Explain clearly to your customers any reasons why their needs or expectations cannot be met									

**Element: 2GEN1/10.3 Communicate information to customers**

**What you must cover:**

(Assessor to record range with reference to element requirements)

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
<b>C3 Hazards</b>									
d using appropriate spoken or written language									
e applying the conventions and rules appropriate to the method of communication you have chosen									

**Additional evidence (if applicable):**

--

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# Optional units



## **Unit 4: Deal with communications as part of the reception function**

**Unit code:** 2FOH1/10

**Unit credit:** 3

**SCQF Unit level:** 5

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### **Introduction**

This unit is about dealing with incoming communications for example taking telephone calls and emails – taking accurate messages and passing them on. It also covers dealing with outgoing communications – for example making telephone calls – and leaving messages where appropriate.

When you have completed this unit, you will have proved you can:

- 2FOH1/10.1 Deal with incoming communications
- 2FOH1/10.2 Deal with outgoing communications.

### **What some of the words in this unit mean**

#### **Communicating in a way that gives a positive impression**

For example, by speaking clearly, avoiding jargon and slang, by avoiding spelling mistakes and simple grammatical errors

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence
For the whole unit	
K1 The range of methods you can use to communicate with other organisations and people	
K2 How to use the communications equipment in your organisation	
K3 Your organisation's style when communicating with other organisations and people	
K4 Why it is important to deal with everyone you communicate with politely and helpfully	
K5 The type of unexpected situations and problems that may occur when communicating with others, and how to deal with these	
K6 Why it is important to give only accurate and non-confidential information	
For Element 2FOH1/10.1 Deal with incoming communications	
K7 Your organisation's standards for answering telephone calls, and why these are important	
K8 Why it is important to identify people who make enquiries and establish their needs	
K9 Why it is important to relay messages promptly to those concerned, and the procedures that you should follow	
For Element 2FOH1/10.2 Deal with outgoing communications	
K10 Why it is important to identify yourself and explain the purpose of making contact	
K11 Why it is important to give only accurate and non-confidential information	
K12 Why it is important to communicate clearly, using a tone and pace which can be easily understood	
K13 How to communicate both orally and in writing, in a way that gives a positive impression of you and your organisation	

**Additional evidence (if applicable):**

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## Element 2FOH1/10.1

### Deal with incoming communications

#### What you must cover

##### **C1 Communications** (at least **two** from)

- a) by telephone
- b) by letter or fax
- c) using email

##### **C2 Enquiries (Both)**

- a) those you can deal with yourself
- b) those that need to be passed/transferred to another person/department

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
1 Deal with communications promptly, politely and in line with your organisation's style									
2 Identify the person, find out what their needs are and deal with these correctly									
3 Answer enquiries accurately without giving any confidential information									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
4 Record clear and accurate messages and pass them on as requested									
5 Deal correctly with any problems									

**Element: 2FOH1/10.1 Deal with incoming communications**

**What you must cover:**

**(Assessor to record range with reference to element requirements)**

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
<b>C1 Communications</b>									
a By telephone									
b By letter or fax									
c Using email									
<b>C2 Enquiries</b>									
a those you can deal with yourself									
b those that need to be passed/ transferred to another person/ department									

**Additional evidence (if applicable):**

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## Element 2FOH1/10.2

### Deal with outgoing communications

#### What you must cover

#### **C3 Methods of communicating** (at least **two** from)

- a) by telephone
- b) by letter or fax
- c) using email

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
6 Choose the best method of communicating with the person concerned									
7 Use your organisation's agreed style									
8 Communicate in a way that gives a positive impression of yourself and your organisation									
9 Identify yourself and explain the reason why you are making contact									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
10 Give only non-confidential and relevant information to the person you have contacted									
11 Leave clear and accurate messages where needed									
12 Deal with any problems correctly									

**Element: 2FOH1/10.2 Deal with outgoing communication**

**What you must cover:**

**(Assessor to record range with reference to element requirements)**

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
<b>C3 Methods of communicating</b>									
d by telephone									
e by letter or fax									
f using email									

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## **Unit 5:**

## **Deal with the arrival of customers**

**Unit code:** 2FOH2/10

**Unit credit:** 4

**SCQF Unit level:** 5

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### **Introduction**

This unit is about dealing with the arrival of customers, processing their registration documents and promoting the products and services of the organisation. Dealing with the arrival of customers is a vital part of the front of house role. You are the likely to be one of the first people the customer will meet, and you need to portray a professional, efficient and helpful image from the start.

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
For the whole unit		
<p>K1 Your organisation's standards for customer care and why these are important</p> <p>K2 Your organisation's booking procedures and why it is important to follow these correctly</p> <p>K3 Your organisation's check in procedures and why it is important to follow these correctly</p> <p>K4 Basic legal requirements relating to accommodation, goods and services for sale</p> <p>K5 The types of unexpected situations and problems that may occur when customers arrive, and how to deal with these</p> <p>K6 Why registration documentation must be correctly completed by the customer</p> <p>K7 The specific requirements for registering overseas visitors</p> <p>K8 Your organisation's procedure for allocation of rooms</p> <p>K9 Why it is important to give accurate information to customers</p> <p>K10 Why it is important to correctly identify customer requirements</p> <p>K11 What registration information must be obtained, in order to comply with legislation</p> <p>K12 Why all correspondence relating to the booking should be available</p>		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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## What you must cover

### **C1 Customers** (at least **one** from)

- a) customers with routine requirements
- b) customers with special requirements
- c) customers without advanced bookings

### **C2 Booking systems** (at least **one** from)

- a) computerised system
- b) manual system

### **C3 Information to customers** (at least **four** from)

- a) location of room
- b) key security and safety procedures
- c) services and facilities available
- d) prices
- e) special offers and promotions available

### **C4 Services and facilities** (at least **one** from)

- a) business facilities
- b) leisure facilities
- c) food and beverage facilities

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
1 Correctly identify customer requirements									
2 Retrieve any customer booking details from the booking system and check them with the customer									
3 Offer alternatives for any services that are not available as requested									
4 Complete the registration document correctly									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
5 Give accurate information which meets customer needs									
6 Promote the services and facilities of your organisation when appropriate									
7 Pass on customer details to the relevant departments in line with organisation's procedures									

**Element: 2FOH2/10 Deal with the arrival of customers**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C1 Hazards</b>									
a Customers with routine requirements									
b Customers with special requirements									
c Customers without advanced bookings									
<b>C2 Booking systems</b>									
a Computerised system									
b Manual system									

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C3 Information to customers</b>									
a Location of room									
b Key security and safety procedures									
c Services and facilities available									
d prices									
e special offers and promotions available									
<b>C4 Services and facilities</b>									
a business facilities									
b leisure facilities									
c food and beverage facilities									

**Additional evidence (if applicable):**

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<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



## **Unit 6: Dealing with bookings**

**Unit code:** 2FOH3/10

**Unit credit:** 4

**SCQF Unit level:** 5

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### **Introduction**

This unit is about handling booking enquiries and taking bookings from customers. It also covers making amendments (for example, of date and time) to bookings, and keeping records up to date.

When you have completed this unit, you will have proved you can:

- 2FOH3/10.1 Deal with booking enquiries
- 2FOH3/10.2 Confirm, cancel and amend bookings.

### **What some of the words in this unit mean**

#### **Customer**

Anyone wanting to make, amend or cancel a booking

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
For the whole unit		
K1 The importance of dealing with customers politely and helpfully at all times		
K2 Why it is important to give accurate spoken and written information to customers		
K3 The types of unexpected situations and problems that may occur with bookings and how to deal with these correctly		
K4 Basic legal requirements relating to goods and services for sale when receiving, confirming, amending and cancelling booking enquiries		
K5 Your organisation's booking procedures and systems		
K6 The importance of up-selling, room/product rates and yield management and how these apply to your work role		
For Element 2FOH3/10.1 Deal with booking enquiries		
K7 Why it is important to get and record booking details accurately		
K8 Why it is important to take the opportunity to sell products and services		
For Element 2FOH3/10.2 Confirm, cancel and amend bookings		
K9 Your organisation's cancellation policies and procedures		
K10 Why confirmations and deposits are required from customers		
K11 Why it is essential to follow up unconfirmed bookings		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Element 2FOH3/10.1

### Deal with booking enquiries

#### What you must cover

##### **C1 Customers** (at least **one** from)

- a) with routine requests
- b) with special needs

##### **C2 Enquiries** (at least **three** from)

- a) face to face
- b) telephone
- c) letter or fax
- d) email
- e) on–line booking systems

##### **C3 Information** (at least **two** from)

- a) services and facilities available
- b) features and benefits of services and facilities
- c) prices
- d) special offers and promotions available

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
1 Be polite and helpful when dealing with enquiries									
2 Find out what your customer needs and give them accurate information									
3 Take the opportunity to sell other products and services to the customer									
4 Invite your customer to make a booking, and take and record their details correctly									

**Element: 2FOH3/10.1 Dealing with bookings**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C1 Customers</b>									
a	With routine requests								
b	With special needs								
<b>C2 Enquiries</b>									
a	Face to face								
b	telephone								
c	letter or fax								
d	email								
e	on-line booking systems								
<b>C3 Information</b>									
a	Fire								
b	Threat								
c	Security								

**Additional evidence (if applicable):**

<p><b>Column key:</b></p>	<p><b>O = direct observation of the learner's performance by their assessor</b></p> <p><b>Q&amp;A = outcomes from oral or written questioning</b></p> <p><b>P = products of the learner's work</b></p> <p><b>RA = personal statements and/or reflective accounts</b></p> <p><b>S = outcome from simulation, where permitted by the assessment strategy</b></p>	<p><b>PD = professional discussion</b></p> <p><b>A = assignment, project/case studies</b></p> <p><b>WT = authentic statements/witness testimony</b></p> <p><b>EPW = expert witness testimony</b></p> <p><b>RPL = evidence of recognition of prior learning</b></p>
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## Element 2FOH3/10.2

### Confirm, cancel and amend bookings

#### What you must cover

##### **C1 Customers** (at least **one** from)

- a) with routine requests
- b) with special needs

##### **C4 Booking systems** (at least **one** from)

- a) computerised systems
- b) manual systems
- c) on–line systems

##### **C5 Booking amendments and cancellations** (at least **one** from)

- a) change bookings
- b) cancel bookings

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
5 Deal with customers in a polite and helpful manner at all times									
6 Deal with confirmations in the booking system									
7 Identify, check and follow up unconfirmed bookings in the booking system									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
8 Deal with booking amendments and cancellations and maintain records of bookings in line with your organisation's procedures									

**Element: 2FOH3/10.2 Confirm, cancel and amend bookings**

**What you must cover:**

**(Assessor to record range with reference to element requirements)**

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C1 Customers</b>									
a	With routine requests								
b	With special needs								
<b>C4 Booking systems</b>									
a	Computerised systems								
b	Manual systems								
c	On-line systems								
<b>C5 Booking amendments and cancellations</b>									
a	Change bookings								
b	Cancel bookings								

**Additional evidence (if applicable):**

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<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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# **Unit 7: Prepare customer accounts and deal with departures**

**Unit code:** 2FOH4/10

**Unit credit:** 4

**SCQF Unit level:** 5

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## **Introduction**

This unit is about maintaining customer accounts by entering charges and adjustments onto the account. It also covers dealing with departing customers by completing the relevant documentation and procedures, and recording customer comments.

When you have completed this unit, you will have proved you can:

- 2FOH4/10.1 Prepare and maintain customer accounts
- 2FOH4/10.2 Deal with the departure of customers.

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
For the whole unit		
K1 Your organisation's standards for customer care and why it is important to follow these		
K2 Basic legal requirements relating to preparing and maintaining customer accounts		
K3 Your organisation's procedures for customer accounts and why it is important to follow these		
For Element 2FOH4/10.1 Prepare and maintain customer accounts		
K4 Why customer accounts must be updated regularly with charges and adjustments		
K5 Why it is important to give accurate verbal and written information to customers		
K6 Why customer accounts must be secured from unauthorised access		
K7 The types of unexpected situations and problems that may occur with customer accounts and how to deal with these correctly		

<b>Knowledge</b>	<b>Type of evidence</b>	<b>Date</b>
For Element 2FOH4/10.2 Deal with the departure of customers		
K8 Basic legal requirements relating to accommodation, goods and services for sale		
K9 Safe and hygienic working practices when dealing with the departure of customers		
K10 Your organisation's procedures for customer departures		
K11 Why complaints, comments and suggestions should be recorded and fed back to the appropriate person/department		
K12 Why details of any extra charges should be available to the customer		
K13 The types of unexpected situations and problems that may occur with customer departures and how to deal with these correctly		
K14 Opportunities to promote the organisation when the customer is leaving		

**Additional evidence (if applicable):**

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<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
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## Element 2FOH4/10.1

### Prepare and maintain customer accounts

#### What you must cover

##### **C1 Account systems** (at least **one** from)

- a) computerised systems
- b) manual systems
- c) online systems

##### **C2 Account adjustments** (at least **two** from)

- a) charges
- b) allowances/discounts
- c) refunds
- d) deposits/pre-payments
- e) transfers

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
1 Enter charges regularly and accurately against customer accounts in the account system									
2 Record any account adjustments accurately against customer accounts									
3 File and store account documents correctly at all times									
4 Complete customer accounts for the customer unauthorised people									
5 Make sure customer accounts cannot be accessed by unauthorised people									

**Element: 2FOH1/10.1 Prepare and maintain customer accounts**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C1 Account systems</b>									
a	Computerised systems								
b	Manual systems								
c	Online systems								
<b>C2 Account adjustments</b>									
a	charges								
b	allowances/ discounts								
c	refunds								
d	deposits/ pre-payments								
e	transfers								

**Additional evidence (if applicable):**

<p><b>Column key:</b></p>	<p><b>O = direct observation of the learner's performance by their assessor</b></p>	<p><b>PD = professional discussion</b></p>
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## Element 2FOH4/10.2

### Deal with the departure of customers

#### What you must cover

##### **C3 Customer accounts** (at least **one** from)

- a) those where part payment is required
- b) those where full payment is required
- c) those where the account does not require immediate settlement

##### **C4 Account or booking system** (at least **one** from)

- a) computerised
- b) manual
- c) online systems

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
6 Prepare documents and other necessary items before the customer departs									
7 Present the account to the customer for confirmation									
8 Check customer account details and request payment as required									
9 Complete documentation and deal with it using the correct account or booking system									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
10 Complete all other procedures for customer departures									
11 Record customer comments, complaints and suggestions and feed them back to the appropriate person or department									
12 Promote establishment services and facilities as appropriate									

**Element: 2FOH4/10.2 Deal with the departure of customers**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C1 Customer accounts</b>									
a those where part payment is required									
b those where full payment is required									
c those where the account does not require immediate payment									
<b>C2 Account or booking system</b>									
a computerised									
b manual									
c online systems									

**Additional evidence (if applicable):**

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## **Unit 8: Provide tourism information services to customers**

**Unit code:** 2FOH11/10

**Unit credit:** 5

**SCQF Unit level:** 5

---

### **Introduction**

Customers visiting your premises will often have a range of enquiries regarding what is available to see and do while they are there. This unit is about providing tourism information to your guests. To do this you must be able to identify what it is your customers want and to source and provide that information.

When you have completed this unit, you will have proved you can:

- 2FOH11/10.1 Work with customers on their tourism information needs
- 2FOH11/10.2 Seek tourism information and offer advice to customers.

### **What some of the words in this unit mean**

#### **Open questions**

These are questions that often start with what, where, who, when and how and stimulate answers that give you information

#### **Active listening skills**

For example making and maintaining eye contact, nodding and smiling

#### **Advice**

Adapting the information you are giving to meet individual requirements

#### **Charges**

Examples include publications for which there is a charge; premium telephone lines to information providers; fees to booking agencies; non-commissionable flights, etc

#### **Electronic sources**

Examples are internet, intranet and computer-based files

#### **Alternative ways to help your customer**

Examples are making a telephone call to find more detailed and or specific information, arranging for further information to be forwarded direct to your customer, referring them to another organisation etc

#### **Organisations**

Examples are tourist information centres, visitor information centres, contact centres, tourism bureaux, visitor attractions, tour operators. It could also refer to your own business, if self-employed

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence
<p>For Element 2FOH11/10.1 Work with customers on their tourism information needs</p> <p>K1 Why it is important to be helpful and polite</p> <p>K2 When and how to use open question techniques effectively</p> <p>K3 Why using active listening skills is helpful to your customer</p> <p>K4 Why it is essential to confirm your customers' needs</p> <p>K5 Why it is important to check your customer is happy with your service and how to deal with any dissatisfaction</p> <p>K6 Have knowledge of where information and sources are available and how you can access them</p> <p>K7 What tourism information your organisation possesses and where this is stored</p> <p>K8 Be aware of any discounts and/or arrangements your organisation may have negotiated with tourism organisations</p> <p>K9 What information is available without charge and what information is available with a charge</p> <p>K10 How to organise your customers in a manner that ensures all customers will be dealt with effectively</p>	

<b>Knowledge</b>	<b>Type of evidence</b>
For Element 2FOH11/10.2 Seek tourism information and offer advice to customers	
K11 How to access and use a range of different information sources	
K12 A range of other external organisations that provide tourism information and how to contact them	
K13 Your company's procedures with regard to booking fees, liabilities and billing customers	
K14 How to effectively structure advice and what limitations there are to the advice you provide	
K15 The relevant parts of the disability discrimination legislation and its implications when giving advice and information to customers	
K16 What methods are available for providing written or printed information to customers	
K17 Methods for politely concluding customer interactions	

**Additional evidence (if applicable):**

<p><b>Column key:</b></p>	<p><b>O = direct observation of the learner's performance by their assessor</b></p>	<p><b>PD = professional discussion</b></p>
	<p><b>Q&amp;A = outcomes from oral or written questioning</b></p>	<p><b>A = assignment, project/case studies</b></p>
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## Element 2FOH11/10.1

### Work with customers on their tourism information needs

#### What you must cover

##### **C1 Information sources** (at least **three** from)

- a) electronic sources
- b) brochures
- c) directories
- d) timetables
- e) maps
- f) guidebooks
- g) external organisations
- h) leaflets

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
1 Politely welcome customers									
2 Use open question techniques to identify your customers' needs									
3 Use active listening skills when identifying your customers' needs									
4 Make clear any areas you are uncertain of with your customer if appropriate									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
5 Confirm with your customer the information they require									
6 If appropriate, ensure that your customer is willing to pay for any external tourism information services									
7 Focus on your customers' needs while recognising other customers that may be waiting									

**Element: 2FOH11/10.1 Work with customers on their tourism information needs**

**What you must cover:**

**(Assessor to record range with reference to element requirements)**

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
<b>C1 information sources</b>									
a Electronic sources									
b brochures									
c directories									
d timetables									
e maps									
f guidebooks									
g external organisations									
h leaflets									

**Additional evidence (if applicable):**

--

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## Element 2FOH11/10.2

### Seek tourism information and offer advice to customers

#### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
8 Identify sources that provide the information required by your customer									
9 Ensure that the information you identify is accurate, current and relates to your customers' needs									
10 Provide relevant information and advice to your customer based on their needs									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
11 Clearly explain any restrictions with information and/or products and services when appropriate									
12 Where several options are available to your customer, offer information and advice on that which you think best meets their needs									
13 Confirm politely with your customers that they understand the information and advice you have given them									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
14 Where appropriate, give the customers written and/or printed confirmation of the information they have sought									
15 Ensure that the customer is happy with the service you have provided and politely conclude the customer enquiry									

**Additional evidence (if applicable):**

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## **Unit 9: Produce documents in a business environment**

**Unit code:** 2FOH5/10

**Unit credit:** 4

**SCQF Unit level:** 5

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### **Introduction**

This unit is about producing high-quality, attractive documents to agreed specifications.

This unit is Unit BAA211 in the Council for Administration Business and Administration suite of standards.

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
For the whole unit		
K1 The purpose and benefits of producing high-quality and attractive documents		
K2 The different types of documents that may be designed and produced and document styles that could be used		
K3 The different formats in which the text may be presented		
K4 The purpose and benefits of agreeing the purpose, content, style, quality standards and deadline for production of the document		
K5 The different types of technology available for inputting, formatting and editing text and their main features		
K6 The types of resources needed to produce high-quality and attractive documents		
K7 How to organise content needed for the document		
K8 How to integrate and layout text and non-text objects		
K9 How to check for accuracy and correctness – including spelling, grammar and punctuation – and the purpose of doing this		
K10 The purpose of storing the document safely and securely and how to do so		
K11 The purpose of confidentiality and data protection		
K12 The purpose and benefits of meeting deadlines		

**Additional evidence (if applicable):**

<p><b>Column key:</b></p>	<p><b>O = direct observation of the learner's performance by their assessor</b></p> <p><b>Q&amp;A = outcomes from oral or written questioning</b></p> <p><b>P = products of the learner's work</b></p> <p><b>RA = personal statements and/or reflective accounts</b></p> <p><b>S = outcome from simulation, where permitted by the assessment strategy</b></p>	<p><b>PD = professional discussion</b></p> <p><b>A = assignment, project/case studies</b></p> <p><b>WT = authentic statements/witness testimony</b></p> <p><b>EPW = expert witness testimony</b></p> <p><b>RPL = evidence of recognition of prior learning</b></p>
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## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
1 Confirm the purpose, content, style and deadlines for the document									
2 Prepare the required resources									
3 Organise the required content									
4 Use available technology appropriate to the document being produced									
5 Produce the document in the agreed style									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
6 Integrate non-text objects in the agreed layout, where required									
7 Check for accuracy, editing and correcting text as necessary									
8 Clarify document requirements, when necessary									
9 Store the document safely and securely in approved locations									

**Additional evidence (if applicable):**

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## **Unit 10: Use office equipment**

**Unit code:** 2FOH6/10

**Unit credit:** 3

**SCQF Unit level:** 4

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### **Introduction**

This unit is about how to use a range of office equipment (such as photocopiers, faxes, binders, laminators, printers or PCs), applying the necessary standards of health and safety and operating practice.

This unit is Unit BAA231 in the Council for Administration Business and Administration suite of standards.

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
For the whole unit		
<p>K1 The different types of office equipment, their features and what they can be used for</p> <p>K2 How to choose equipment and resources that are appropriate for the task</p> <p>K3 The reasons for following manufacturers' and organisational instructions when operating equipment</p> <p>K4 How to use different types of office equipment safely</p> <p>K5 The reasons for keeping waste to a minimum and how to do so</p> <p>K6 The reasons for keeping equipment clean and hygienic</p> <p>K7 The reasons for following manufacturers' instructions and organisational procedures when dealing with equipment faults</p> <p>K8 The types of equipment and resource faults you are likely to experience and the correct way of dealing with these</p> <p>K9 The purpose of meeting work standards and deadlines</p> <p>K10 The purpose of leaving equipment, resources and work area ready for the next user to agreed requirements</p>		

**Additional evidence (if applicable):**

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<b>Column key:</b>	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
1 Locate and select the equipment and resources needed for the task									
2 Follow manufacturer's and organisational operating instructions and health and safety requirements for different equipment									
3 Waste as few resources as possible									
4 Keep the equipment clean and hygienic									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
5 Deal with equipment and resource problems according to manufacturer's and organisational procedures									
6 Report problems you cannot deal with personally to the appropriate colleague									
7 Make sure the final work product meets the agreed requirements									
8 Produce the work product within agreed timescales									
9 Make sure the equipment, resources and work area are ready for the next user									

**Additional evidence (if applicable):**

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## **Unit 11:**

## **Prepare to communicate in a business environment**

**Unit code:** 2FOH7/10

**Unit credit:** 3

**SCQF Unit level:** 5

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### **Introduction**

This unit is about preparing how to communicate both verbally and in writing within a business environment.

This unit is Unit BAA614 in the Council for Administration Business and Administration suite of standards.

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
Plan communication		
K1 The reasons for identifying the purpose of communication and the audience		
K2 Methods of communication and situations in which to use them		
Communicate in writing		
K3 Relevant sources of information		
K4 How to use language appropriate to the audience, the chosen communication method and the purpose of the communication		
K5 How to organise, structure and present information for the audience		
K6 How to check the accuracy of information		
K7 How to use grammar, punctuation and spelling accurately		
K8 The principles of Plain English		
K9 The reasons for proofreading or checking work		
K10 How to recognise when work is urgent or important		
K11 The organisational procedures for filing communications		
Communicate verbally		
K12 How to present information and ideas clearly		
K13 Ways of contributing to discussions that will help to move them forward		
K14 Methods of active listening		
K15 The reasons for summarising communication		

Knowledge	Type of evidence	Date
After communication		
K16 How to seek feedback on whether the communication achieved its purpose K17 The value of reflecting on the outcomes of communication and of identifying ways to further develop communication skills		

**Additional evidence (if applicable):**

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**Plan communication 2FOH7/10.1**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
1 Identify the purpose of the communication and the audience									
2 Decide which method of communication to use									

**Additional evidence (if applicable):**

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<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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## Communicate in writing 2FOH7/10.2

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
3 Find and select information that supports the purpose of the communication									
4 Organise, structure and present information to suit the audience's needs and what you want to say									
5 Confirm and read written material that contains information that is needed									
6 Extract the main points needed from written material									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
7 Use accurate grammar, punctuation and spelling									
8 Proofread or check work and make any necessary amendments									
9 Produce the communication to meet deadlines recognising the difference between what is important and what is urgent									
10 Keep a file copy of all communication									

**Additional evidence (if applicable):**

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<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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## Communicate verbally 2FOH7/10.3

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
11 Present information and ideas clearly to others									
12 Make contributions to discussions that help to move the discussion forward									
13 Listen actively to information that other people are communicating and respond appropriately									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
14 Ask relevant questions to clarify anything not understood									
15 Summarise the communication with the person/people being communicated with to make sure the meaning has been understood									

**Additional evidence (if applicable):**

<p><b>Column key:</b></p>	<p><b>O = direct observation of the learner's performance by their assessor</b></p>	<p><b>PD = professional discussion</b></p>
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Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## After communication 2FOH7/10.4

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
16 Seek feedback on whether the communication achieved its purpose									
17 Reflect on the outcomes of communication and identify ways to develop communication skills further									

**Additional evidence (if applicable):**

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## **Unit 12:**

## **Handle mail and book external services**

<b>Unit code:</b>	2FOH8/10
<b>Unit credit:</b>	3
<b>SCQF Unit level:</b>	5

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### **Introduction**

This unit is about collecting, sorting and distributing mail and booking external services such as transport.

When you have completed this unit, you will have proved you can:

- 2FOH8/10.1 Handle mail and messages
- 2FOH8/10.2 Book external services

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
For the whole unit		
K1 Why it is important to deal with everyone you communicate with politely and helpfully		
For Element 2FOH8/10.1 Handle mail and messages		
K2 Legal requirements for handling mail and messages		
K3 Safe and hygienic working practices when handling mail, messages and written communications		
K4 Your organisation's procedures for handling and distributing mail and why these are important		
K5 Why suspicious items should be reported immediately		
K6 Why written communications should be secured against unauthorised access		
K7 What the procedures are for recorded delivery and registered mail		
K8 The type of unexpected situations and problems that may occur and how to deal with these		
For Element 2FOH8/10.2 Book external services		
K9 The types of services you may be asked to book and the procedures you should follow		
K10 Why it is important to give accurate verbal and written information to customers		
K11 Why confirmation and deposits are required from customers		
K12 The type of unexpected situations and problems that may occur and how to deal with these		

**Additional evidence (if applicable):**

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<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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## Element 2FOH8/10.1

### Handle mail and messages

#### What you must cover

##### **C1 Mail** (at least **one** from)

- a) letters
- b) parcels
- c) registered or courier delivered post
- d) electronic

##### **C2 Messages** (at least **two** from)

- a) faxes
- b) emails
- c) typed/handwritten memos

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
1 Collect mail and messages									
2 Sort and distribute mail and messages to the correct person or place									
3 Deal with mail and messages which have not been collected and distributed in line with workplace procedures									
4 Make sure that mail and messages are kept secure									

**Element: 2FOH8/10.1 Handle mail and messages**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C1 Mail</b>									
a	letters								
b	parcels								
c	registered or courier delivered post								
d	electronic								
<b>C2 Messages</b>									
a	faxes								
b	emails								
c	types/handwritten memos								

**Additional evidence (if applicable):**

--

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<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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## Element 2FOH8/10.2

### Book external services

#### What you must cover

#### **C3 Services** (at least **two** from)

- a) transport
- b) deliveries
- c) entertainment

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
5 Identify customer needs and requirements									
6 Identify organisations correctly and contact them as requested									
7 Book services which meet customer needs									
8 Provide customers with accurate details of the booking and of any alternatives offered									
9 Follow your organisation's procedures for booking services									

**Element: 2FOH8/10.2 Book external services**

**What you must cover:**

**(Assessor to record range with reference to element requirements)**

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
<b>C3 Services</b>									
a	transport								
b	deliveries								
c	entertainment								

**Additional evidence (if applicable):**

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<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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## **Unit 13: Provide reception services**

**Unit code:** 2FOH9/10

**Unit credit:** 3

**SCQF Unit level:** 5

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### **Introduction**

This unit is about maintaining a reception service that enhances the vision and brand of the organisation.

This unit is Unit BAC312 in the Council for Administration Business and Administration suite of standards.

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
For the whole unit		
K1 The purpose and value of the receptionist function as the first point of contact between the public/client and the organisation		
K2 How to present a positive image of self and the organisation		
K3 The organisation's structure and lines of communication		
K4 The purpose of confidentiality guidelines		
K5 How to implement confidentiality guidelines		
K6 The purpose of entry and security procedures		
K7 How to implement entry and security procedures		
K8 The purpose of health and safety procedures		
K9 How to implement health and safety procedures		
K10 How to contribute ideas for improving the reception area in terms of accessibility, functionality and environment, security and safety and facilities for visitors		
K11 The organisational emergency procedures and your role within them		
K12 Why additional duties are carried out during quiet periods, if they arise		

**Additional evidence (if applicable):**

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<b>Column key:</b>	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
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## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
1 Present a positive image of self and the organisation									
2 Provide individuals with requested information and other information which may be useful to them, within guidelines on confidentiality									
3 Implement the correct entry and security procedures									
4 Follow the relevant health and safety procedures									
5 Refer any issues that cannot be dealt with personally to the appropriate person									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
6 Maintain the reception area to give a positive impression of the organisation									
7 Suggest ideas for improving the reception area									
8 Follow organisational procedures in the event of an accident or emergency									
9 Carry out additional duties during quiet periods, if they arise									

**Additional evidence (if applicable):**

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## **Unit 14:**

## **Store and retrieve information**

**Unit code:** 2FOH10/10

**Unit credit:** 3

**SCQF Unit level:** 5

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### **Introduction**

This unit is about processing, storing, and retrieving information using different information systems, in line with organisational requirements.

This unit is Unit BAD332 in the Council for Administration Business and Administration suite of standards.

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
For the whole unit		
K1 The purpose of storing and retrieving required information K2 The different information systems and their main features K3 Legal and organisational requirements covering the security and confidentiality of information K4 The purpose of confirming information to be collected, stored and retrieved K5 The methods that can be used to collect required information K6 The procedures to be followed to access information systems K7 The types of information to be deleted K8 The procedures for identifying and deleting information and why they must be followed K9 How to make sure information is accurate K10 The problems that occur with information systems and who to report them to K11 The purpose of providing information in the required format and within agreed timescales		

**Additional evidence (if applicable):**

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## Process information 2FOH10/10.1

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
1 Identify and collect required information									
2 Follow agreed procedures and legislation to maintain security and confidentiality									
3 Store required information in approved locations to the agreed deadlines									
4 Update information, as required									
5 Follow agreed procedures for deleting information									

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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## Retrieve information 2FOH10/10.2

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
6 Confirm information for retrieval									
7 Comply with procedures and legislation for accessing an information system									
8 Locate and retrieve the required information									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
9 Follow the correct procedures when there are problems with information systems									
10 Provide information in the agreed format and within agreed timescales									

**Additional evidence (if applicable):**

<p><b>Column key:</b></p>	<p><b>O = direct observation of the learner's performance by their assessor</b></p>	<p><b>PD = professional discussion</b></p>
	<p><b>Q&amp;A = outcomes from oral or written questioning</b></p>	<p><b>A = assignment, project/case studies</b></p>
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# **Unit 15: Resolve customer service problems**

**Unit code:** 2GEN5/10

**Unit credit:** 6

**SCQF Unit level:** 5

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## **Introduction**

This unit is about the effective handling of customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

It is sometimes difficult to meet customer expectations. Even if the service you give is excellent, some customers experience problems. Part of your job is to help to resolve those problems. There is likely to be a problem if customer expectations are not met.

This may be because your customer's expectations involve more than you can offer or because your service procedures have not been followed. Some problems are reported by customers and sometimes you spot the problem first and resolve it before your customer has even noticed. As soon as you are aware of a problem, you need to consider the options and then choose a way to put it right. This unit is particularly important in customer service because many customers judge how good the customer service of your organisation is by the way problems are handled. This unit is Unit C3 from the Institute of Customer Service suite of standards.

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

<b>Knowledge</b>	<b>Type of evidence</b>	<b>Date</b>
For the whole unit		
K1 Organisational procedures and systems for dealing with customer service problems		
K2 How to defuse potentially stressful situations		
K3 How to negotiate		
K4 The limitations of what you can offer your customer		
K5 Types of action that may make a customer problem worse and should be avoided		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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## Spot customer service problems 2GEN5/10.1

### What you must cover

#### **C1 Resolving problems (All from)**

- (a) a problem first identified by customers
- (b) a problem identified within the organisation before it has affected your customer
- (c) a problem caused by differences between your customer's expectations and what you organisation can offer
- (d) a problem caused by a system or procedure failure
- (e) a problem caused by a lack of resources or human error

#### **C2 Resolving problems (All from)**

- (a) supplied relevant information when customer have requested it
- (b) supplied relevant information when customers have not requested it
- (c) have used agreed organisational procedures when solving problems
- (d) have made exceptions to usual practice with the agreement of others

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
1 Listen carefully to your customers about any problem they have raised									
2 Ask your customers about the problem to check your understanding									
3 Recognise repeated problems and alert the appropriate authority									
4 Share customer feedback with others to identify potential problems before they happen									
5 Identify problems with systems and procedures before they begin to affect your customers									

**Element: 2GEN5/10.1 Spot customer service problems**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C1 Resolving problems</b>									
a	a problem first identified by customers								
b	a problem identified within the organisation before it has affected your customer								
c	a problem caused by differences between your customer's expectations and what your organisation can offer								

**Element: 2GEN5/10.1 Spot customer service problems**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
d	a problem caused by a system or procedure failure								
e	a problem caused by a lack of resources or human error								

**Element: 2GEN5/10.1 Spot customer service problems**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C2 Resolving problems</b>									
a	supplied relevant information when customer have requested it								
b	supplied relevant information when customers have not requested it								
c	have used agreed organisational procedures when solving problems								
d	have made exceptions to usual practice with the agreement of others								

**Additional evidence (if applicable):**

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**Pick the best solution to resolve customer service problems 2GEN5/10.2**

**What you must cover**

**C1 Resolving problems (All from)**

- (f) a problem first identified by customers
- (g) a problem identified within the organisation before it has affected your customer
- (h) a problem caused by differences between your customer's expectations and what you organisation can offer
- (i) a problem caused by a system or procedure failure
- (j) a problem caused by a lack of resources or human error

**C2 Resolving problems (All from)**

- (e) supplied relevant information when customer have requested it
- (f) supplied relevant information when customers have not requested it
- (g) have used agreed organisational procedures when solving problems
- (h) have made exceptions to usual practice with the agreement of others

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
6 Identify the options for resolving a customer service problem									
7 Work with others to identify and confirm the options to resolve a customer service problem									
8 Work out the advantages and disadvantages of each option for your customer and your organisation									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
9 Pick the best option for your customer and your organisation									
10 Identify for your customer other ways that problems may be resolved if you are unable to help									

**Element: 2GEN5/10.2 Pick the best solution to resolve customer service problems**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C1 Resolving problems</b>									
a a problem first identified by customers									
b a problem identified within the organisation before it has affected your customer									
c a problem caused by differences between your customer's expectations and what your organisation can offer									

**Element: 2GEN5/10.2 Pick the best solution to resolve customer service problems**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
d	a problem caused by a system or procedure failure								
e	a problem caused by a lack of resources or human error								

**Element: 2GEN5/10.2 Pick the best solution to resolve customer service problems**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C2 Resolving problems</b>									
a	supplied relevant information when customer have requested it								
b	supplied relevant information when customers have not requested it								
c	have used agreed organisational procedures when solving problems								
d	have made exceptions to usual practice with the agreement of others								

**Additional evidence (if applicable):**

--

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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## Take action to resolve customer service problems 2GEN5/10.3

### What you must cover

#### **C1 Resolving problems (All from)**

- (k) a problem first identified by customers
- (l) a problem identified within the organisation before it has affected your customer
- (m) a problem caused by differences between your customer's expectations and what you organisation can offer
- (n) a problem caused by a system or procedure failure
- (o) a problem caused by a lack of resources or human error

#### **C2 Resolving problems (All from)**

- (i) supplied relevant information when customer have requested it
- (j) supplied relevant information when customers have not requested it
- (k) have used agreed organisational procedures when solving problems
- (l) have made exceptions to usual practice with the agreement of others

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
11 Discuss and agree the options for solving the problem with your customer									
12 Take action to implement the option agreed with your customer									
13 Work with others and your customer to make sure that any promises related to solving the problem are kept									
14 Keep your customer fully informed about what is happening to resolve the problem									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
15 Check with your customer to make sure the problem has been resolved to their satisfaction									
16 Give clear reasons to your customer when the problem has not been resolved to their satisfaction									

**Element: 2GEN5/10.3 Take action to resolve customer service problems**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C1 Resolving problems</b>									
a a problem first identified by customers									
b a problem identified within the organisation before it has affected your customer									
c a problem caused by differences between your customer's expectations and what your organisation can offer									

**Element: 2GEN5/10.3 Take action to resolve customer service problems**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
d	a problem caused by a system or procedure failure								
e	a problem caused by a lack of resources or human error								

**Element: 2GEN5/10.3 Take action to resolve customer service problems**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C2 Resolving problems</b>									
a	supplied relevant information when customer have requested it								
b	supplied relevant information when customers have not requested it								
c	have used agreed organisational procedures when solving problems								
d	have made exceptions to usual practice with the agreement of others								

**Additional evidence (if applicable):**

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## **Unit 16:**

## **Promote additional services or products to customers**

**Unit code:** 2GEN6/10

**Unit credit:** 6

**SCQF Unit level:** 5

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### **Introduction**

Services or products are continually changing in organisations to keep up with customers' expectations. By offering new or improved services or products your organisation can increase customer satisfaction. Many organisations must promote these to be able to survive in a competitive world. This unit is about your need to keep pace with new developments and to encourage your customers to take an interest in them. Customers expect more and more services or products to be offered to meet their own growing expectations; from offering dinner reservations at check-in to providing a coffee and liqueurs service at the end of a meal. They need to be made aware of what is available from your organisation.

This unit is Unit A5 from the Institute of Customer Service suite of standards.

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
For the whole unit		
<p>K1 Your organisation's procedures and systems for encouraging the use of additional services or products</p> <p>K2 How additional services or products will benefit your customers</p> <p>K3 How your customer's use of additional services or products will benefit your organisation</p> <p>K4 The main factors that influence customers to use your services or products</p> <p>K5 How to introduce additional services or products to customers, outlining their benefits, overcoming reservations and agreeing to provide the additional services or products</p> <p>K6 How to give appropriate, balanced information to customers about services or products</p>		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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**Identify additional services or products that are available 2GEN6/10.1**

**What you must cover**

**C1 Additional services or products** (at least **All** from)

- (a) uses of services or products that are new to your customer
- (b) additional use of services or products that your customer has used before

**C2 Identifying customer needs** (at least **All** from)

- (a) identify what your customer wants by seeking information directly
- (b) identify what your customer wants from spontaneous customer comments

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
1 Update and develop your knowledge of your organisation's services or products									
2 Check with others when you are unsure about new service or product details									
3 Identify appropriate services or products that may interest your customer									
4 Spot opportunities for offering your customer additional services or products that will improve their customer experience									

**Element: 2GEN6/10.1 Identify additional services or products that are available**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C1 Additional services or products</b>									
a	uses of services or products that are new to your customer								
b	additional use of services or products that your customer has used before								
<b>C2 Identifying customer needs</b>									
a	identify what your customer wants by seeking information directly								
b	identify what your customer wants from spontaneous customer comments								

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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**Inform customers about additional services or products 2GEN6/10.2**

**What you must you must cover**

**C1 Additional services or products** (at least **All** from)

- (a) uses of services or products that are new to your customer
- (b) additional use of services or products that your customer has used before

**C2 Identifying customer needs** (at least **All** from)

- (a) identify what your customer wants by seeking information directly
- (b) identify what your customer wants from spontaneous customer comments

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
5 Choose the best time to inform your customer about additional services or products									
6 Choose the best method of communication to introduce your customer to additional services or products									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
7 Give your customer accurate and sufficient information to enable them to make a decision about the additional services or products									
8 Give your customer time to ask questions about the additional services or products									

**Element: 2GEN6/10.2 Inform customers about additional services or products**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C1 Additional services or products</b>									
c	uses of services or products that are new to your customer								
d	additional use of services or products that your customer has used before								
<b>C2 Identifying customer needs</b>									
c	identify what your customer wants by seeking information directly								
d	identify what your customer wants from spontaneous customer comments								

**Additional evidence (if applicable):**

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**Gain customer commitment to using additional services or products**  
**2GEN6/10.3**

**What you must cover**

**C1 Additional services or products** (at least **All** from)

- (a) uses of services or products that are new to your customer
- (b) additional use of services or products that your customer has used before

**C2 Identifying customer needs** (at least **All** from)

- (a) identify what your customer wants by seeking information directly
- (b) identify what your customer wants from spontaneous customer comment

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
9 Close the conversation if your customer shows no interest									
10 Give information to move the situation forward when your customer shows interest									
11 Secure customer agreement and check customer understanding of the delivery of the service or product									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
12 Take action to ensure prompt delivery of the additional services or products to your customer									
13 Refer your customer to others or to alternative sources of information, if the additional services or products are not your responsibility									

**Element: 2GEN6/10.3 Gain customer commitment to using additional services or products**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C1 Additional services or products</b>									
e uses of services or products that are new to your customer									
f additional use of services or products that your customer has used before									
<b>C2 Identifying customer needs</b>									
e identify what your customer wants by seeking information directly									
f identify what your customer wants from spontaneous customer comments									

**Additional evidence (if applicable):**

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# **Unit 17: Deal with customers across a language divide**

**Unit code:** 2GEN7/10

**Unit credit:** 8

**SCQF Unit level:** 5

## **Introduction**

Customer service is frequently delivered across a language divide. In a multi-cultural society many customers may have a different first language from those delivering customer service to them. This language divide can present a real challenge to those who deliver customer service. This unit is about preparing to deliver customer service across a language divide and seeing through that delivery. The unit covers the steps that are needed to deal with customers with different language preferences without having full access to your customer's first language. You should choose this unit if you frequently deal across a language divide. Remember, customers can be both external and internal to your organisation. This unit is Unit B5 from the Institute of Customer Services suite of standards.

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

<b>Knowledge</b>	<b>Type of evidence</b>	<b>Date</b>
For the whole unit		
K1 The languages that you are most likely to encounter among groups of your customers K2 How to greet, thank and say farewell to customers in their first languages K3 The importance of dealing with customers in their first language if possible K4 How to explain to a customer that you cannot hold an extended conversation in their first language K5 The importance of tone, pace and volume when dealing with customers across a language divide K6 Possible sources of assistance to use when a language barrier demands additional language skills		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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**Prepare to deal with customers with a different first language 2GEN7/10.1**

**What you must cover**

**C1 Dealing with customers** (at least **All** from)

- (a) during routine delivery of customer service
- (b) during a busy time in your job
- (c) during a quiet time in your job

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
1 Identify the language or languages other than your own that you are most likely to come across when dealing with customers									
2 Learn a greeting, an expression of thanks and a farewell phrase in the language you expect to encounter									
3 Identify a source of assistance with a language you expect to encounter when delivering customer service									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
4 Agree with colleagues informal signing options that may be used for key aspects of your services or products when dealing with somebody with a different first language									
5 Log useful words and phrases to support your dealings with a customer with a different first language									
6 Learn an appropriate phrase to explain to your customer in their first language that you do not speak that language fluently									

**Element: 2GEN7/10.1 Prepare to deal with customers with a different first language**

**What you must cover:**

**(Assessor to record range with reference to element requirements)**

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
<b>C1 Dealing with customers</b>									
a	during routine delivery of customer service								
b	during a busy time in your job								
c	during a quiet time in your job								

**Additional evidence (if applicable):**

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**Deal with customers who speak a different first language from your own**  
**2GEN7/10.2**

**What you must cover**

**C1 Dealing with customers** (at least **All** from)

- (a) during routine delivery of customer service
- (b) during a busy time in your job
- (c) during a quiet time in your job

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
7 Identify your customer's first language and indicate to them that you are aware of this									
8 Establish the expectations of your customer regarding whether they expect to deal in your first language or theirs									
9 Speak clearly and slowly if using a language which is not the first language for either you or your customer									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
10 Maintain a consistent tone and volume when dealing with somebody across a language divide									
11 Listen closely to your customer to identify any words they may be using in a way that differs from the way you would generally use the same words									
12 Check your understanding of specific words with your customer using questions for clarification									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
13 Seek appropriate assistance from colleagues if you are unable to complete a customer transaction because of language barriers									
14 Reword a question or explanation if your customer clearly does not understand your original wording									
15 Use a few words of your customer's first language to create a rapport									

**Element: 2GEN7/10.2 Deal with customers who speak a different first language from your own**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C1 Dealing with customers</b>									
d	during routine delivery of customer service								
e	during a busy time in your job								
f	during a quiet time in your job								

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/ case studies</b>
	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

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I confirm that the candidate has achieved all the requirements of this Unit.

Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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## **Unit 18:**

## **Maintain customer service through effective handover**

**Unit code:** 2GEN8/10

**Unit credit:** 4

**SCQF Unit level:** 5

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### **Introduction**

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

This unit is Unit B8 in the Institute of Customer Service suite of standards.

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
For the whole unit		
K1 Your organisation's customer service procedures for the services or products you are involved in delivering		
K2 The appropriate colleagues to pass responsibility to for completing particular customer service actions		
K3 Ways of ensuring that information is passed between you and your colleagues effectively		
K4 Ways to remind yourself of actions that need to be checked when you have passed on responsibility to a colleague		
K5 The importance of checking tactfully with a colleague whether they have completed the customer service actions you were expecting		
K6 Opportunities for contributing to review the way customer service actions are shared in customer service processes		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Agree joint responsibilities in a customer service team 2GEN8/10.1

### What you must cover

#### **C1 Maintaining customer service** (at least **All** from)

- (a) during routine delivery of customer service
- (b) during a busy time in your job
- (c) during a quiet time in your job
- (d) when peoples, systems or resources have let you down

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
1 Identify services or products you are involved in delivering that rely on effective teamwork									
2 Identify steps in the customer service delivery process that rely on exchange of information between you and your colleagues									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
3 Agree with colleagues when it is right to pass responsibility for completing a customer service action to another									
4 Agree with colleagues how information should be exchanged between you to enable another to complete a customer service action									
5 Identify ways of reminding yourself when you have passed responsibility to a colleague for completing a customer service action									

**Element: 2GEN8/10.1 Agree joint responsibilities in a customer service team**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C1 Maintain customer service</b>									
a during routine delivery of customer service									
b during a busy time in your job									
c during a quiet time in your job									
d when peoples, systems or resources have let you down									

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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**Check that customer service actions are seen through by working together with colleagues 2GEN8/10.2**

### **What you must cover**

#### **C1 Maintaining customer service** (at least **All** from)

- (a) during routine delivery of customer service
- (b) during a busy time in your job
- (c) during a quiet time in your job
- (d) when peoples, systems or resources have let you down

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
6 Access reminders to identify when to check that a customer service action has been completed									
7 Ensure that you are aware of all details of customer service actions your colleague was due to complete									
8 Ask your colleague about the outcome of their completing the customer service action as agreed									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
9 Identify the next customer service actions if your colleagues has been unable to complete the actions you had previously agreed									
10 Work with colleagues to review the way in which customer service actions are shared									

**Element: 2GEN8/10.2 Check that customer service actions are seen through by working together with colleagues**

**What you must cover:**

(Assessor to record range with reference to element requirements)

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
<b>C1 Maintain customer service</b>									
a	during routine delivery of customer service								
b	during a busy time in your job								
c	during a quiet time in your job								
d	when peoples, systems or resources have let you down								

**Additional evidence (if applicable):**

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<b>Column key:</b>	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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## **Unit 19:**

## **Maintain and deal with payments**

**Unit code:** 2GEN9/10

**Unit credit:** 4

**SCQF Unit level:** 5

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### **Introduction**

This unit is about maintaining a payment point such as a till. It also covers taking payments from the customer, operating the till correctly and keeping payments safe and secure.

### **What some of the words in this unit mean**

#### **Authorised collection**

The correct person coming to pick up the payments from the till

#### **Cash equivalents**

For example, vouchers, discounts, ledger payments

#### **Payment point**

A till, credit/debit machine or hand-held device

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
For the whole unit		
<p>K1 Legal requirements for operating a payment point and taking payments from customers</p> <p>K2 Your organisation's security procedures for cash and other types of payments</p> <p>K3 How you should set up your payment point</p> <p>K4 How to get stocks of materials you need to set up and maintain the payment point</p> <p>K5 Why it is important to tell the customer about any delays and how you should do so</p> <p>K6 The types of problems that might happen with your payment point and how to deal with these</p> <p>K7 How to change the till/debit/credit machine roll</p> <p>K8 The correct procedures for handling payments</p> <p>K9 What you should do if there are errors in handling payments</p> <p>K10 Understand the procedures for dealing with hand-held payment devices at tables</p> <p>K11 What procedure you must follow with regard to a payment that has been declined</p> <p>K12 What might happen if you do not report errors</p> <p>K13 The types of problems that may happen when you are taking payments and how to deal with these</p> <p>K14 The procedures for collecting the contents of the payment point and who you should hand payments over to</p>		

**Additional evidence (if applicable):**

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<b>Column key:</b>	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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## What you must cover

### **C1 Materials** (at least **two** from)

- (a) cash
- (b) cash equivalents
- (c) relevant stationery
- (d) till/credit/debit rolls

### **C2 Payments** (at least **two** from)

- (a) ash
- (b) cheques
- (c) credit cards
- (d) debit cards
- (e) cash equivalents

## What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date	Type of evidence	Portfolio reference	Date
To meet the national standard you must:									
1 Make sure your payment point is working and that you have all the materials you need									
2 Maintain the payment point and restock it when necessary									
3 Enter/scan information into the payment point correctly									
4 Tell the customer how much they have to pay									

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
To meet the national standard you must:									
5 Acknowledge the customer's payment and validate it where necessary									
6 Follow correct procedure for chip and pin transactions									
7 Put the payment in the right place according to your organisation's procedures									
8 Give correct change for cash transactions									
9 Carry out transactions without delay and give relevant confirmation to the customer									
10 Make the payment point contents available for authorised collection when asked to									

**Element: 2GEN9/10 Maintain and deal with payments**

**What you must cover:**

**(Assessor to record range with reference to element requirements)**

<b>Practical</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio reference</b>	<b>Date</b>
<b>C1 Materials</b>									
a	cash								
b	cash equivalents								
c	relevant stationery								
d	till/credit/debit rolls								
<b>C2 Payments</b>									
a	cash								
b	cheques								
c	credit cards								
d	debit cards								
e	cash equivalents								

**Additional evidence (if applicable):**

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# Annexe A

## Evidence requirements

### SVQ Level 2 Front of House Reception Mandatory units

<b>1GEN1/09</b>	<b>Maintain a safe, hygienic and secure working environment</b>
<b>Element 1GEN1/09.1</b>	<b>Maintain personal health and hygiene</b>
What you must <b>DO</b> for 1GEN1/09.1	The assessor <b>must</b> assess statements P1–P2 by direct observation of the candidate’s work.
What you must <b>COVER</b> for 1GEN1/09.1	There are no ‘What you must cover’ for Element 1.
<b>Element 1GEN1/09.2</b>	<b>Help to maintain a hygienic, safe and secure workplace</b>
What you must <b>DO</b> for 1GEN1/09.2	The assessor must assess statements P6, P9-P11 by direct observation of the candidate’s work. Simulation <i>may</i> be used for P7 – P8 if no naturally occurring evidence is available.
What you must <b>COVER</b> for 1GEN1/09.2	There must be performance evidence, gathered through observing the candidate’s work for: <b>C1 Hazards</b> (at least <b>one</b> from the following) <ul style="list-style-type: none"> <li>(a) relating to equipment</li> <li>(b) relating to areas where you work</li> <li>(c) relating to personal clothing</li> </ul> <b>C2 Ways of dealing with hazards</b> (at least <b>none</b> required from the following) <ul style="list-style-type: none"> <li>(a) putting them right yourself</li> <li>(b) reporting them to appropriate colleagues</li> <li>(c) warning other people</li> </ul> <b>C3 Emergency procedures</b> (at least <b>one</b> from the following) <ul style="list-style-type: none"> <li>(a) fire</li> <li>(b) threat</li> <li>(c) security</li> </ul> Evidence for the remaining points under ‘what you must cover’ may be assessed through questioning, witness testimony or simulation.

<b>1GEN4/09</b>	<b>Work effectively as part of a hospitality team</b>
What you must <b>DO</b> for 1GEN4/09	The assessor must ensure that there is sufficient evidence that shows what the candidate has done over a sufficient period of time with different customers and on different occasions.
What you must <b>COVER</b> for 1GEN4/09	There are no 'What you must cover' for this unit.

<b>2GEN1/10</b>	<b>Give customers a positive impression of yourself and your organisation (ICS)</b>
<b>Element 2GEN1/10.1</b>	<b>Establish effective rapport with customers</b>
What you must <b>DO</b> for 2GEN1/10.1	The assessor must ensure that there is sufficient evidence that shows what the candidate has done over a sufficient period of time with different customers and on different occasions. Simulation is NOT allowed for any performance evidence (What you have to cover or What you must cover) within this Unit.
What you must <b>COVER</b> for 2GEN1/10.1	There must be performance evidence, gathered through observing the candidate's work for: <b>C1 Communication method</b> (at least <b>three</b> from the following) <ul style="list-style-type: none"> <li>(a) face to face</li> <li>(b) in writing</li> <li>(c) by telephone</li> <li>(d) by text message</li> <li>(e) by e-mail (including social networking)</li> <li>(f) Intranet</li> </ul> Evidence for the remaining points under 'what you must cover' may be assessed through questioning, witness testimony or simulation.

<b>Element 2GEN1/10.2</b>	<b>Respond appropriately to customers</b>
What you must <b>DO</b> for 2GEN1/10.2	The assessor must ensure that there is sufficient evidence that shows what the candidate has done over a sufficient period of time with different customers and on different occasions. Simulation is NOT allowed for any performance evidence (What you have to cover or What you must cover) within this Unit.
What you must <b>COVER</b> for 2GEN1/10.2	There must be performance evidence, gathered through observing the candidate's work for: <b>C2 Positive impression</b> <ul style="list-style-type: none"> <li>(a) during routine delivery of customer service</li> <li>(b) during a busy time in your job</li> <li>(c) during a quiet time in your job</li> <li>(d) when people, systems or resources have let you down</li> </ul> Evidence for the remaining points under 'what you must cover' may be assessed through questioning, witness testimony or simulation.
<b>Element 2GEN1/10.3</b>	<b>Communicate information to customers</b>
What you must <b>DO</b> for 2GEN1/10.3	The assessor must ensure that there is sufficient evidence that shows what the candidate has done over a sufficient period of time with different customers and on different occasions. Simulation is NOT allowed for any performance evidence (What you have to cover or What you must cover) within this Unit.
What you must <b>COVER</b> for 2GEN1/10.3	There must be performance evidence, gathered through observing the candidate's work for: <b>C3 Communicate with customers</b> <ul style="list-style-type: none"> <li>(a) using appropriate spoken or written language</li> <li>(b) applying the conventions and rules appropriate to the method of communication you have chosen</li> </ul> Evidence for the remaining points under 'what you must cover' may be assessed through questioning, witness testimony or simulation.

## SVQ Level 2 Front of House Reception Section A units

Level 2 Front of House Reception unit titles
<p>Evidence requirements are included in this document for the following units:</p> <p>2FOH1 / 10 Deal with communications as part of the reception function</p> <p>2FOH2 / 10 Deal with the arrival of customers</p> <p>2FOH3 / 10 Dealing with bookings</p> <p>2FOH4 / 10 Prepare customer accounts and deal with departures</p> <p>2FOH8 / 10 Handle mail and book external services</p> <p>2FOH11 / 10 Provide tourism information services to customers</p>

2FOH1/10	Deal with communications as part of the reception function
Element 2FOH1/10.1	Deal with incoming communications
What you must <b>DO</b> for 2FOH1/10.1	The assessor must assess statements P1–P4 by direct observation.
What you must <b>COVER</b> for 2FOH1/10.1	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <p><b>C1 Communications</b> (at least <b>two</b> from)</p> <ul style="list-style-type: none"> <li>(a) by telephone</li> <li>(b) by letter or fax</li> <li>(c) using e-mail</li> </ul> <p><b>C2 Enquiries</b> (both from)</p> <ul style="list-style-type: none"> <li>(a) those you can deal with yourself</li> <li>(b) those that need to be passed/transferred to another person/department</li> </ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning, witness testimony or simulation.</p>

<b>Element 2FOH1/10.2</b>	<b>Deal with outgoing communications</b>
What you must <b>DO</b> for 2FOH1/10.2	The assessor must assess statements P6–P10 by direct observation.
What you must <b>COVER</b> for 2FOH1/10.2	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <p><b>C3 Methods of communicating</b> (at least <b>two</b> from)</p> <ul style="list-style-type: none"> <li>(a) by telephone</li> <li>(b) by letter or fax</li> <li>(c) using e-mail</li> </ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning, witness testimony or simulation.</p>

<b>2FOH2/10</b>	<b>Deal with the arrival of customers</b>
What you must <b>DO</b> for 2FOH2/10	The assessor must assess statements P1, P2 and P4–P6 by direct observation.
What you must <b>COVER</b> for 2FOH2/10	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <p><b>C1 Customers</b> (at least <b>one</b> from)</p> <ul style="list-style-type: none"> <li>(a) customers with routine requirements</li> <li>(b) customers with special requirements</li> <li>(c) customers without advanced bookings</li> </ul> <p><b>C2 Booking systems</b> (at least <b>one</b> from)</p> <ul style="list-style-type: none"> <li>(a) computerised system</li> <li>(b) manual system</li> </ul> <p><b>C3 Information to customers</b> (at least <b>four</b> from)</p> <ul style="list-style-type: none"> <li>(a) location of room</li> <li>(b) key security and safety procedures</li> <li>(c) services and facilities available</li> <li>(d) prices</li> <li>(e) special offers and promotions available</li> </ul> <p><b>C4 Services and facilities</b> (at least <b>one</b> from)</p> <ul style="list-style-type: none"> <li>(a) business facilities</li> <li>(b) leisure facilities</li> <li>(c) food and beverage facilities</li> </ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning, witness testimony or simulation.</p>

<b>2FOH3/10</b>	<b>Dealing with Bookings</b>
<b>Element 2FOH3/10.1</b>	<b>Deal with booking enquiries</b>
What you must <b>DO</b> for 2FOH3/10.1	The assessor must assess statements P1–P4 by direct observation.
What you must <b>COVER</b> for 2FOH3/10.1	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <p><b>C1 Customers</b> (at least <b>one</b> from)</p> <ul style="list-style-type: none"> <li>(a) with routine requests</li> <li>(b) with special needs</li> </ul> <p><b>C2 Enquiries</b> (at least <b>three</b> from)</p> <ul style="list-style-type: none"> <li>(a) face-to-face</li> <li>(b) telephone</li> <li>(c) letter or fax</li> <li>(d) e-mail</li> <li>(e) on-line booking systems</li> </ul> <p><b>C3 Information</b> (at least <b>two</b> from)</p> <ul style="list-style-type: none"> <li>(a) services and facilities available</li> <li>(b) features and benefits of services and facilities</li> <li>(c) prices</li> <li>(d) special offers and promotions available</li> </ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning, witness testimony or simulation.</p>

Element 2FOH3/10.2	Confirm, cancel and amend bookings
What you must <b>DO</b> for 2FOH3/10.2	The assessor must assess statements P5–P8 by direct observation.
What you must <b>COVER</b> for 2FOH3/10.2	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <p><b>C1 Customers</b> (at least <b>one</b> from)</p> <ul style="list-style-type: none"> <li>(a) with routine requests</li> <li>(b) with special needs</li> </ul> <p><b>C4 Booking systems</b> (at least <b>one</b> from)</p> <ul style="list-style-type: none"> <li>(a) computerised systems</li> <li>(b) manual systems</li> <li>(c) on-line systems</li> </ul> <p><b>C5 Booking amendments and cancellations</b> (at least <b>one</b> from)</p> <ul style="list-style-type: none"> <li>(a) change bookings</li> <li>(b) cancel bookings</li> </ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning, witness testimony or simulation.</p>

2FOH4/10	Prepare Customer Accounts and Deal with Departures
Element 2FOH4/10.1	Prepare and maintain customer accounts
What you must <b>DO</b> for 2FOH4/10.1	The assessor must assess statements P1–P5 by direct observation.
What you must <b>COVER</b> for 2FOH4/10.1	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <p><b>C1 Account systems</b> (at least <b>one</b> from)</p> <ul style="list-style-type: none"> <li>(a) computerised systems</li> <li>(b) manual systems</li> <li>(c) online systems</li> </ul> <p><b>C2 Account adjustments</b> (at least <b>two</b> from)</p> <ul style="list-style-type: none"> <li>(a) charges</li> <li>(b) allowances/discounts</li> <li>(c) refunds</li> <li>(d) deposits/pre-payments</li> <li>(e) transfers</li> </ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning, witness testimony or simulation.</p>

<b>Element 2FOH4/10.2</b>	<b>Deal with the departure of customers</b>
What you must <b>DO</b> for 2FOH4/10.2	The assessor must assess statements P6–P10 by direct observation.
What you must <b>COVER</b> for 2FOH4/10.2	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <p><b>C3 Customer accounts</b> (at least <b>one</b> from)</p> <ul style="list-style-type: none"> <li>(a) those where part payment is required</li> <li>(b) those where full payment is required</li> <li>(c) those where the account does not require immediate settlement</li> </ul> <p><b>C4 Account or booking system</b> (at least <b>one</b> from)</p> <ul style="list-style-type: none"> <li>(a) computerised</li> <li>(b) manual</li> <li>(c) online systems</li> </ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning, witness testimony or simulation.</p>

<b>2FOH11/10</b>	<b>Provide Tourism Information Services to Customers</b>
<b>Element 2FOH11/10.1</b>	<b>Work with customers on their tourism information needs</b>
What you must <b>DO</b> for 2FOH11/10.1	The assessor must assess statements P1–P3 and P5 by direct observation.
What you must <b>COVER</b> for 2FOH11/10.1	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <p><b>C1 Information sources</b> (at least <b>three</b> from)</p> <ul style="list-style-type: none"> <li>(a) electronic sources</li> <li>(b) brochures</li> <li>(c) directories</li> <li>(d) timetables</li> <li>(e) maps</li> <li>(f) guidebooks</li> <li>(g) external organisations</li> <li>(h) leaflets</li> </ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning, witness testimony or simulation.</p>

Element <b>2FOH11/10.2</b>	<b>Seek tourism information and offer advice to customers</b>
What you must <b>DO</b> for 2FOH11/10.2	The assessor must assess statements P8–P10, P13 and P15 by direct observation.
What you must <b>COVER</b> for 2FOH11/10.2	There are no 'what you must cover' for 2FOH11/10.2

## Level 2 Front of House Reception Section B Units

Level 2 Front Of House Reception unit titles	
Evidence requirements are included in this document for the following units:	
2FOH1/10 Deal with communications as part of the reception function	
2FOH2/10 Deal with the arrival of customers	
2FOH3/10 Dealing with bookings	
2FOH4/10 Prepare customer accounts and deal with departures	
2FOH8/10 Handle mail and book external services	
2FOH11/10 Provide tourism information services to customers	
Evidence requirements for the following units are set by the SSC in brackets	
2FOH5/10	Produce documents in a business environment (CfA)
2FOH6/10	Use office equipment (CfA)
2FOH7/10	Prepare to communicate in a business environment (CfA)
2FOH9/10	Provide reception services (CfA)
2FOH10/10	Store and retrieve information (CfA)

2FOH5/10	Produce documents in a business environment (CfA)
What you must <b>DO</b> for 2FOH5/10	There are no 'what you must do' for 2FOH5/10
What you must <b>COVER</b> for 2FOH5/10	There are no 'what you must cover' for 2FOH5/10

2FOH6/10	Use office equipment (CfA)
What you must <b>DO</b> for 2FOH6/10	There are no 'what you must do' for 2FOH6/10
What you must <b>COVER</b> for 2FOH6/10	There are no 'what you must cover' for 2FOH6/10

2FOH7/10	Prepare to communicate in a business environment (CfA)
What you must <b>DO</b> for 2FOH7/10	There are no 'what you must do' for 2FOH7/10
What you must <b>COVER</b> for 2FOH7/10	There are no 'what you must cover' for 2FOH7/10

<b>2FOH8/10</b>	<b>Handle Mail and Book External Services</b>
<b>Element 2FOH8/10.1</b>	<b>Handle mail and messages</b>
What you must <b>DO</b> for 2FOH8/10.1	The assessor must assess statements P1–P4 by direct observation.
What you must <b>COVER</b> for 2FOH8/10.1	There must be performance evidence, gathered through observing the candidate's work for: <b>C1 Mail</b> (at least <b>one</b> from) (a) letters (b) parcels (c) registered or courier delivered post (d) electronic <b>C2 Messages</b> (at least <b>two</b> from) (a) faxes (b) e-mails (c) typed/handwritten memos Evidence for the remaining points under 'what you must cover' may be assessed through questioning, witness testimony or simulation.
<b>Element 2FOH8/10.2</b>	<b>Book external services</b>
<b>What you must DO for 2FOH8/10.2</b>	<b>The assessor must assess statements P5–P9 by direct observation.</b>
What you must <b>COVER</b> for 2FOH8/10.2	There must be performance evidence, gathered through observing the candidate's work for: <b>C3 Services</b> (at least <b>two</b> from) (a) transport (b) deliveries (c) entertainment Evidence for the remaining points under 'what you must cover' may be assessed through questioning, witness testimony or simulation.

<b>2FOH9/10</b>	<b>Provide Reception Services (CfA)</b>
What you must <b>DO</b> for 2FOH9/10	There are no 'what you must do' for 2FOH9/10
What you must <b>COVER</b> for 2FOH9/10	There are no 'what you must cover' for 2FOH9/10

<b>2FOH10/10</b>	<b>Store and Retrieve Information (CfA)</b>
What you must <b>DO</b> for 2FOH10/10	There are no 'what you must do' for 2FOH10/10
What you must <b>COVER</b> for 2FOH10/10	There are no 'what you must cover' for 2FOH10/10

<b>2GEN5/10</b>	<b>Resolve customer service problems (ICS)</b>
<b>Element 2GEN5/10.1</b>	<b>Spot customer service problems</b>
What you must <b>DO</b> for 2GEN5/10.1	The assessor must ensure that there is sufficient evidence that shows what the candidate has done over a sufficient period of time with different customers and on different occasions. Simulation is NOT allowed for any performance evidence (What you have to cover or What you must cover) within this unit.
What you must <b>COVER</b> for 2GEN5/10.1	There must be performance evidence, gathered through observing the candidate's work for: <b>C1 Resolving problems (All from)</b> <ul style="list-style-type: none"> <li>(a) a problem first identified by customers</li> <li>(b) a problem identified within the organisation before it has affected your customer</li> <li>(c) a problem caused by differences between your customer's expectations and what your organisation can offer</li> <li>(d) a problem caused by a system or procedure failure</li> <li>(e) a problem caused by a lack of resources or human error</li> </ul> <b>C2 Resolving problems (All from)</b> <ul style="list-style-type: none"> <li>(a) supplied relevant information when customer have requested it</li> <li>(b) supplied relevant information when customers have not requested it</li> <li>(c) have used agreed organisational procedures when solving problems</li> <li>(d) have made exceptions to usual practice with the agreement of others</li> </ul>

Element <b>2GEN5/10.2</b>	<b>Pick the best solution to resolve customer service problems</b>
What you must <b>DO</b> for 2GEN5/10.2	The assessor must ensure that there is sufficient evidence that shows what the candidate has done over a sufficient period of time with different customers and on different occasions. Simulation is NOT allowed for any performance evidence (What you have to cover or What you must cover) within this unit.
What you must <b>COVER</b> for 2GEN5/10.2	There must be performance evidence, gathered through observing the candidate's work for: <b>C1 Resolving problems (All from)</b> <ul style="list-style-type: none"> <li>(a) a problem first identified by customers</li> <li>(b) a problem identified within the organisation before it has affected your customer</li> <li>(c) a problem caused by differences between your customer's expectations and what you organisation can offer</li> <li>(d) a problem caused by a system or procedure failure</li> <li>(e) a problem caused by a lack of resources or human error</li> </ul> <b>C2 Resolving problems (All from)</b> <ul style="list-style-type: none"> <li>(a) supplied relevant information when customer have requested it</li> <li>(b) supplied relevant information when customers have not requested it</li> <li>(c) have used agreed organisational procedures when solving problems</li> <li>(d) have made exceptions to usual practice with the agreement of others</li> </ul>

Element <b>2GEN5/10.3</b>	<b>Take action to resolve customer service problems</b>
What you must <b>DO</b> for 2GEN5/10.3	The assessor must ensure that there is sufficient evidence that shows what the candidate has done over a sufficient period of time with different customers and on different occasions. Simulation is NOT allowed for any performance evidence (What you have to cover or What you must cover) within this unit.
What you must <b>COVER</b> for 2GEN5/10.3	There must be performance evidence, gathered through observing the candidate's work for: <b>C1 Resolving problems (All from)</b> <ul style="list-style-type: none"> <li>(a) a problem first identified by customers</li> <li>(b) a problem identified within the organisation before it has affected your customer</li> <li>(c) a problem caused by differences between your customer's expectations and what you organisation can offer</li> <li>(d) a problem caused by a system or procedure failure</li> <li>(e) a problem caused by a lack of resources or human error</li> </ul> <b>C2 Resolving problems (All from)</b> <ul style="list-style-type: none"> <li>(a) supplied relevant information when customer have requested it</li> <li>(b) supplied relevant information when customers have not requested it</li> <li>(c) have used agreed organisational procedures when solving problems</li> <li>(d) have made exceptions to usual practice with the agreement of others</li> </ul>

<b>2GEN6/10</b>	<b>Promote additional services or products to customers (ICS)</b>
<b>Element 2GEN6/10.1</b>	<b>Identify additional services or products that are available</b>
What you must <b>DO</b> for 2GEN6/10.1	The assessor must ensure that there is sufficient evidence that shows what the candidate has done over a sufficient period of time with different customers and on different occasions. Simulation is NOT allowed for any performance evidence (What you have to cover or What you must cover) within this Unit.
What you must <b>COVER</b> for 2GEN6/10.1	There must be performance evidence, gathered through observing the candidate's work for: <b>C1 Additional services or products</b> (at least <b>All</b> from) (a) uses of services or products that are new to your customer (b) additional use of services or products that your customer has used before <b>C2 Identifying customer needs</b> (at least <b>All</b> from) (a) identify what your customer wants by seeking information directly (b) identify what your customer wants from spontaneous customer comments
<b>Element 2GEN6/10.2</b>	<b>Inform customers about additional services or products</b>
What you must <b>DO</b> for 2GEN6/10.2	The assessor must ensure that there is sufficient evidence that shows what the candidate has done over a sufficient period of time with different customers and on different occasions. Simulation is NOT allowed for any performance evidence (What you have to cover or What you must cover) within this Unit.
What you must <b>COVER</b> for 2GEN6/10.2	There must be performance evidence, gathered through observing the candidate's work for: <b>C1 Additional services or products</b> (at least <b>All</b> from) (a) uses of services or products that are new to your customer (b) additional use of services or products that your customer has used before <b>C2 Identifying customer needs</b> (at least <b>All</b> from) (a) identify what your customer wants by seeking information directly (b) identify what your customer wants from spontaneous customer comments

<b>Element 2GEN6/10.3</b>	<b>Gain customer commitment to using additional services or products</b>
What you must <b>DO</b> for 2GEN6/10.3	The assessor must ensure that there is sufficient evidence that shows what the candidate has done over a sufficient period of time with different customers and on different occasions. Simulation is NOT allowed for any performance evidence (What you have to cover or What you must cover) within this Unit.
What you must <b>COVER</b> for 2GEN6/10.3	There must be performance evidence, gathered through observing the candidate's work for: <b>C1 Additional services or products</b> (at least <b>All</b> from) (a) uses of services or products that are new to your customer (b) additional use of services or products that your customer has used before <b>C2 Identifying customer needs</b> (at least <b>All</b> from) (a) identify what your customer wants by seeking information directly (b) identify what your customer wants from spontaneous customer comments

<b>2GEN7/10</b>	<b>Deal with customers across a language divide (ICS)</b>
<b>Element 2GEN7/10.1</b>	<b>Prepare to deal with customers with a different first language</b>
What you must <b>DO</b> for 2GEN7/10.1	The assessor must ensure that there is sufficient evidence that shows what the candidate has done over a sufficient period of time with different customers and on different occasions. Simulation is NOT allowed for any performance evidence (What you have to cover or What you must cover) within this Unit.
What you must <b>COVER</b> for 2GEN7/10.1	There must be performance evidence, gathered through observing the candidate's work for: <b>C1 Dealing with customers</b> (at least <b>All</b> from) (a) during routine delivery of customer service (b) during a busy time in your job (c) during a quiet time in your job

<b>Element 2GEN7/10.2</b>	<b>Deal with customers who speak a different first language from your own</b>
What you must <b>DO</b> for 2GEN7/10.2	The assessor must ensure that there is sufficient evidence that shows what the candidate has done over a sufficient period of time with different customers and on different occasions. Simulation is NOT allowed for any performance evidence (What you have to cover or What you must cover) within this Unit.
What you must <b>COVER</b> for 2GEN7/10.2	There must be performance evidence, gathered through observing the candidate's work for: <b>C1 Dealing with customers</b> (at least <b>All</b> from) (a) during routine delivery of customer service (b) during a busy time in your job (c) during a quiet time in your job

<b>2GEN8/10</b>	<b>Maintain customer service through effective handover (ICS)</b>
<b>Element 2GEN8/10.1</b>	<b>Agree joint responsibilities in a customer service team</b>
What you must <b>DO</b> for 2GEN8/10.1	The assessor must ensure that there is sufficient evidence that shows what the candidate has done over a sufficient period of time with different customers and on different occasions. Simulation is NOT allowed for any performance evidence (What you have to cover or What you must cover) within this Unit.
What you must <b>COVER</b> for 2GEN8/10.1	There must be performance evidence, gathered through observing the candidate's work for: <b>C1 Maintaining customer service</b> (at least <b>All</b> from) (a) during routine delivery of customer service (b) during a busy time in your job (c) during a quiet time in your job (d) when peoples, systems or resources have let you down

<b>Element 2GEN8/10.1</b>	<b>Check that customer service actions are seen through by working together with colleagues</b>
What you must <b>DO</b> for 2GEN8/10.2	The assessor must ensure that there is sufficient evidence that shows what the candidate has done over a sufficient period of time with different customers and on different occasions. Simulation is NOT allowed for any performance evidence (What you have to cover or What you must cover) within this Unit.
What you must <b>COVER</b> for 2GEN8/10.2	There must be performance evidence, gathered through observing the candidate's work for: <b>C1 Maintaining customer service</b> (at least <b>All</b> from) <ul style="list-style-type: none"> <li>(a) during routine delivery of customer service</li> <li>(b) during a busy time in your job</li> <li>(c) during a quiet time in your job</li> <li>(d) when peoples, systems or resources have let you down</li> </ul>

<b>2GEN9/10</b>	<b>Maintain and deal with payments</b>
What you must <b>DO</b> for 2GEN9/10	The assessor must assess statements P1 and P3–P10 by direct observation.
What you must <b>COVER</b> for 2GEN9/10	There must be performance evidence, gathered through observing the candidate's work for: <b>C1 Materials</b> (at least <b>two</b> from) <ul style="list-style-type: none"> <li>(a) cash</li> <li>(b) cash equivalents</li> <li>(c) relevant stationery</li> <li>(d) till/credit/debit rolls</li> </ul> <b>C2 Machine</b> (at least <b>two</b> from) <ul style="list-style-type: none"> <li>(a) cash</li> <li>(b) cheques</li> <li>(c) credit cards</li> <li>(d) debit cards</li> <li>(e) cash equivalents</li> </ul> Evidence for the remaining points under 'what you must cover' may be assessed through questioning, witness testimony or simulation.

