

Specification

BTEC Specialist qualifications

Edexcel BTEC Level 2 Award in Customer Service (QCF)

Edexcel BTEC Level 2 Certificate in Customer Service (QCF)

Edexcel BTEC Level 3 Award in Customer Service (QCF)

Edexcel BTEC Level 3 Certificate in Customer Service (QCF)

For first teaching August 2010

Edexcel, a Pearson company, is the UK's largest awarding body, offering academic and vocational qualifications and testing to more than 25,000 schools, colleges, employers and other places of learning in the UK and in over 100 countries worldwide. Qualifications include GCSE, AS and A Level, NVQ and our BTEC suite of vocational qualifications from entry level to BTEC Higher National Diplomas, recognised by employers and higher education institutions worldwide.

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BTEC Specialist qualification titles covered by this specification

Edexcel BTEC Level 2 Award in Customer Service (QCF)

Edexcel BTEC Level 2 Certificate in Customer Service (QCF)

Edexcel BTEC Level 3 Award in Customer Service (QCF)

Edexcel BTEC Level 3 Certificate in Customer Service (QCF)

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

The qualification titles listed above feature in the funding lists published annually by the DfE and the regularly updated website www.education.gov.uk/. The QCF Qualification Accreditation Number (QAN) should be used by centres when they wish to seek public funding for their learners. Each unit within a qualification will also have a QCF unit code.

The QCF qualification and unit codes will appear on learners' final certification documentation.

The Qualification Accreditation Numbers for the qualifications in this publication are:

Edexcel BTEC Level 2 Award in Customer Service (QCF)	501/0441/X
Edexcel BTEC Level 2 Certificate in Customer Service (QCF)	501/0442/1
Edexcel BTEC Level 3 Award in Customer Service (QCF)	501/0444/5
Edexcel BTEC Level 3 Certificate in Customer Service (QCF)	501/0443/3

These qualification titles will appear on learners' certificates. Learners need to be made aware of this when they are recruited by the centre and registered with Edexcel.

The Edexcel BTEC Level 2 Certificate in Customer Service (QCF) and the Edexcel BTEC Level 3 Certificate in Customer Service (QCF) are accredited by Ofqual as being part of Apprenticeships.

The Edexcel BTEC Level 2 Award in Customer Service (QCF) and the Edexcel BTEC Level 3 Award in Customer Service (QCF) are accredited by Ofqual as being Stand Alone.

Welcome to Edexcel BTEC Level 2 and 3 Awards and Certificates in Customer Service (QCF)

We are delighted to introduce our new qualifications, which will be available for teaching from September 2010. These qualifications have been revised and conform with the requirements of the new QCF (Qualifications and Credit Framework).

Focusing on the Edexcel BTEC Level 2 and 3 Awards and Certificates in Customer Service (QCF)

The Edexcel BTEC Level 2 Award in Customer Service (QCF) is designed for people working in, or aspiring to work in, customer service related roles and has been developed to provide the underpinning knowledge and understanding for the Level 2 NVQ in Customer Service (QCF).

Learners taking this qualification can progress into employment or further education/training including qualifications such as the Edexcel BTEC Level 2 Certificate in Customer Service (QCF) or the Edexcel BTEC Level 3 Award/Certificate in Customer Service (QCF).

The Edexcel BTEC Level 2 Certificate in Customer Service (QCF) is designed for people working in, or aspiring to work in, customer service related roles and has been developed to provide the underpinning knowledge and understanding for the Level 2 NVQ in Customer Service (QCF). This qualification is approved as a technical certificate for the Apprenticeship in Customer Service.

Learners taking this qualification can progress into employment or further education/training including qualifications such as the Edexcel BTEC Level 3 Award/Certificate in Customer Service (QCF).

The Edexcel BTEC Level 3 Award in Customer Service (QCF) is designed for people working in, or aspiring to work in, customer service related roles and has been developed to provide the underpinning knowledge and understanding for the Level 3 NVQ in Customer Service (QCF).

Learners taking this qualification can progress into employment or further education/training including qualifications such as the Edexcel BTEC Level 3 Certificate in Customer Service (QCF).

The Edexcel BTEC Level 3 Certificate in Customer Service (QCF) is designed for people working in, or aspiring to work in, customer service related roles and has been developed to provide the underpinning knowledge and understanding for the Level 3 NVQ in Customer Service (QCF). This qualification is approved as a technical certificate for the Advanced Apprenticeship in Customer Service.

Learners taking this qualification can progress into employment or further education/training such as the Level 4 NVQ Diploma in Customer Service (QCF).

Straightforward to implement, teach and assess

Implementing BTECs could not be easier. They are designed to fit easily into your curriculum and can be studied independently or alongside existing qualifications, to suit the interests and aspirations of learners. The clarity of assessment makes grading learner attainment simpler.

Engaging for everyone

Learners of all abilities flourish when they can apply their own knowledge, skills and enthusiasm to a subject. BTEC qualifications make explicit the link between theoretical learning and the world of work by giving learners the opportunity to apply their research, skills and knowledge to work-related contexts and case studies. These applied and practical approaches give all learners the impetus they need to achieve and the skills they require for workplace or education progression.

Recognition

BTECs are understood and recognised by a large number of organisations in a wide range of sectors. BTEC qualifications are developed with key industry representatives and Sector Skills Councils (SSC) to ensure that they meet employer and student needs — **in this case the Council for Administration SSC**. Many industry and professional bodies offer successful BTEC learners exemptions from their own accredited qualifications.

All you need to get started

To help you off to a flying start, we have developed an enhanced specification that gives you all the information you need to start teaching BTEC. This includes:

- a framework of equivalencies, so you can see how this qualification compares with other Edexcel vocational qualifications
- information on rules of combination, structures and quality assurance, so you can deliver the qualification with confidence
- explanations of the content's relationship with the learning outcomes
- guidance on assessment, and what the learner must produce to achieve the unit.

Don't forget that we are always here to offer curriculum and qualification updates, local training and network opportunities, advice, guidance and support.

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What are BTEC Level 2 and 3 Specialist qualifications?

BTEC Specialist qualifications are qualifications at Entry Level to Level 3 in the Qualifications and Credit Framework (QCF) and are designed to provide specialist work-related qualifications in a range of sectors. They give learners the knowledge, understanding and skills that they need to prepare for employment. The qualifications also provide career development opportunities for those already in work. Consequently they provide a course of study for full-time or part-time learners in schools, colleges and training centres.

BTEC Specialist qualifications provide much of the underpinning knowledge and understanding for the National Occupational Standards for the sector, where appropriate. They are supported by the relevant Standards Setting Body (SSB) or Sector Skills Council (SSC). A number of BTEC Specialist qualifications are recognised as the knowledge components of Apprenticeships Frameworks.

On successful completion of a BTEC Specialist qualification, learners can progress to or within employment and/or continue their study in the same or related vocational area.

Care needs to be exercised when registering learners as the titling conventions and titles for the revised QCF versions of the BTEC Level 2 Firsts and BTEC Level 3 Nationals have changed.

The QCF is a framework which awards credit for qualifications and units and aims to present qualifications in a way that is easy to understand and measure. It enables learners to gain qualifications at their own pace along flexible routes.

There are three sizes of qualification in the QCF:

- Award (1 to 12 credits)
- Certificate (13 to 36 credits)
- Diploma (37 credits and above).

Every unit and qualification in the framework will have a credit value.

The credit value of a unit specifies the number of credits that will be awarded to a learner who has achieved the learning outcomes of the unit.

The credit value of a unit is based on:

- one credit for those learning outcomes achievable in 10 hours of learning
- learning time – defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria.

The credit value of the unit will remain constant in all contexts, regardless of the assessment method used for the qualification(s) to which it contributes.

Learning time should address all learning (including assessment) relevant to the learning outcomes, regardless of where, when and how the learning has taken place.

Edexcel BTEC Level 2 Award (10 credits) and Level 2 Certificate (13 credits)

The 10-credit Edexcel BTEC Level 2 Award and 13-credit Edexcel BTEC Level 2 Certificate cover some of the knowledge and practical skills required for a particular vocational sector.

The Edexcel BTEC Level 2 Award and Certificate offer an engaging programme for those who are clear about the vocational area they want to learn more about. These learners may wish to extend their programme through the study of a related GCSE, a complementary NVQ or other related vocational or personal and social development qualifications. These learning programmes can be developed to allow learners to study complementary qualifications without duplication of content.

For adult learners, the Edexcel BTEC Level 2 Award and Certificate can extend their knowledge and understanding of work in a particular sector. They are suitable qualifications for those wishing to change career or move into a particular area of employment following a career break.

Edexcel BTEC Level 3 Award (10 credits) and Level 3 Certificate (13 credits)

The 10-credit Edexcel BTEC Level 3 Award and 13-credit Edexcel BTEC Level 3 Certificate cover some of the knowledge and practical skills required for a particular vocational sector.

The Edexcel BTEC Level 3 Award and Certificate offer an engaging programme for those who are clear about the vocational area they want to learn more about. These learners may wish to extend their programme through the study of a related GCSE, a complementary NVQ or other related vocational or personal and social development qualification. These learning programmes can be developed to allow learners to study complementary qualifications without duplication of content.

For adult learners, the Edexcel BTEC Level 3 Award and Certificate can extend their knowledge and understanding of work in a particular sector. They are suitable qualifications for those wishing to change career or move into a particular area of employment following a career break.

Key features of the Edexcel BTEC Level 2 and 3 Awards and Certificates in Customer Service

The Edexcel BTEC Level 2 and 3 Awards and Certificates in Customer Service have been developed to give learners the opportunity to:

- engage in learning that is relevant to them and which will provide opportunities to develop a range of skills and techniques, personal skills and attributes essential for successful performance in working life
- achieve a nationally recognised, Level 2 or 3 vocationally-related qualification
- progress to employment in a particular vocational sector
- progress to related general and/or vocational qualifications.

National Occupational Standards

Where relevant, Edexcel BTEC Level 2 and 3 qualifications are designed to provide some of the underpinning knowledge and understanding for the National Occupational Standards (NOS), as well as developing practical skills in preparation for work and possible achievement of NVQs in due course. NOS form the basis of National Vocational Qualifications (NVQs). Edexcel BTEC Levels 2 and 3 (QCF) qualifications do not purport to deliver occupational competence in the sector, which should be demonstrated in a work context.

For each unit in the specification links to elements of the NOS are identified in *Annexe C*.

The Edexcel BTEC Level 2 Award and Certificate in Customer Service relate to the following NOS:

- Level 2 Customer Service.

The Edexcel BTEC Level 3 Award and Certificate in Customer Service relate to the following NOS:

- Level 3 Customer Service.

Rules of combination

The rules of combination specify the credits that need to be achieved, through the completion of particular units, for the qualification to be awarded. All accredited qualifications within the QCF have rules of combination.

Rules of combination Edexcel BTEC Level 2 and 3 qualifications

When combining units for an Edexcel BTEC Level 2 or 3 qualification in Customer Service, it is the centre's responsibility to ensure that the following rules of combination are adhered to.

Edexcel BTEC Level 2 Award in Customer Service

- 1 Qualification credit value: a minimum of 10 credits.
- 2 Minimum credit to be achieved at, or above, the level of the qualification: 10.
- 3 All credits must be achieved from the units listed in this specification.

Edexcel BTEC Level 2 Certificate in Customer Service

- 1 Qualification credit value: a minimum of 13 credits.
- 2 Minimum credit to be achieved at, or above, the level of the qualification: 13.
- 3 All credits must be achieved from the units listed in this specification.

Edexcel BTEC Level 3 Award in Customer Service

- 1 Qualification credit value: a minimum of 10 credits.
- 2 Minimum credit to be achieved at, or above, the level of the qualification: 10.
- 3 All credits must be achieved from the units listed in this specification.

Edexcel BTEC Level 3 Certificate in Customer Service

- 1 Qualification credit value: a minimum of 13 credits.
- 2 Minimum credit to be achieved at, or above, the level of the qualification: 10 credits.
- 3 All credits must be achieved from the units listed in this specification.

Edexcel BTEC Level 2 Award in Customer Service

The Edexcel BTEC Level 2 Award in Customer Service is a 10 credit and 65 guided learning hour (GLH) qualification that consists of two mandatory units that provide for a combined total of 10 credits.

Edexcel BTEC Level 2 Award in Customer Service			
Unit	Mandatory units	Credit	Level
1	Understanding good customer service	6	2
2	Delivering effective customer service	4	2

Edexcel BTEC Level 2 Certificate in Customer Service

The Edexcel BTEC Level 2 Certificate in Customer Service is a 13-credit and 85 guided learning hour (GLH) qualification that consists of three mandatory units that provide for a total of 13 credits.

Edexcel BTEC Level 2 Certificate in Customer Service			
Unit	Mandatory units	Credit	Level
1	Understanding good customer service	6	2
2	Delivering effective customer service	4	2
3	Planning for self-development in customer service	3	2

Edexcel BTEC Level 3 Award in Customer Service

The Edexcel BTEC Level 3 Award in Customer Service is a 10 credit and 65 guided learning hour (GLH) qualification that consists of two mandatory units that provide for a total of 10 credits.

Edexcel BTEC Level 3 Award in Customer Service			
Unit	Mandatory units	Credit	Level
4	Providing excellent customer service	6	3
5	Improving customer service	4	3

Edexcel BTEC Level 3 Certificate in Customer Service

The Edexcel BTEC Level 3 Certificate in Customer Service is a 13 credit and 85 guided learning hour (GLH) qualification that consists of three mandatory units that provide for a total of 13 credits.

Edexcel BTEC Level 3 Certificate in Customer Service			
Unit	Mandatory units	Credit	Level
3	Planning for self-development in customer service	3	2
4	Providing excellent customer service	6	3
5	Improving customer service	4	3

Assessment

All units within these qualifications can be either externally assessed by the use of onscreen multiple-choice tests or internally assessed. No other form of assessment is available for these qualifications.

The qualifications are criterion referenced, based on the achievement of all the specified learning outcomes.

Each of the units within the qualifications has specified assessment criteria. The overall grading in these qualifications is a pass, based on the successful completion of the external assessment(s) or a portfolio of evidence or a combination of both.

External assessments using onscreen multiple-choice tests assess all the learning outcomes in all units and meet the standard determined by the assessment criteria in the units.

All of the content in each unit that is being assessed by a time-constrained multiple-choice assessment method is mandatory. Therefore tutors must ensure that learners have covered all the content before sitting any external test.

Information relating to external assessments can be found in the *Centre Guidance for Tested Vocational Qualifications* which can be found on the Edexcel website (www.edexcel.com).

Guidance

The purpose of assessment is to ensure that effective learning has taken place to give learners the opportunity to:

- meet the standard determined by the assessment criteria and
- achieve the learning outcomes.

All assessments created by centres for the development of portfolio evidence should be reliable and fit for purpose, and should be built on the unit assessment criteria. Assessment tasks and activities should enable learners to produce valid, sufficient and reliable evidence that relates directly to the specified criteria. Centres should enable learners to produce evidence in a variety of different forms, which may include performance observation, presentations and posters, along with projects, or time-constrained assessments.

Centres are encouraged to emphasise the practical application of the assessment criteria, providing a realistic scenario for learners to adopt, and making maximum use of practical activities. The creation of assignments that are fit for purpose is vital to achievement and their importance cannot be over-emphasised.

The assessment criteria must be clearly indicated in the assignments briefs. This gives learners focus and helps with internal verification and standardisation processes. It will also help to ensure that learner feedback is specific to the assessment criteria.

When designing assignment briefs, centres are encouraged to identify common topics and themes. A central feature of vocational assessment is that it allows for assessment to be:

- current, ie to reflect the most recent developments and issues
- local, ie to reflect the employment context of the delivering centre
- flexible to reflect learner needs, ie at a time and in a way that matches the learner's requirements so that they can demonstrate achievement.

Qualification grade

Learners who achieve the minimum eligible credit value specified by the rules of combination will achieve the qualification at pass grade.

In Edexcel BTEC Level 2 and 3 Specialist qualifications each unit has a credit value which specifies the number of credits that will be awarded to a learner who has achieved the learning outcomes of the unit. This has been based on:

- one credit for those learning outcomes achievable in 10 hours of learning time
- learning time being defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria
- the credit value of the unit remaining constant regardless of the method of assessment used or the qualification to which it contributes.

Quality assurance of centres

Edexcel BTEC Level 2 and 3 qualifications provide a flexible structure for learners enabling programmes of varying credits and combining different levels. For the purpose of quality assurance, all individual qualifications and units are considered as a whole.

Centres delivering Edexcel BTEC Level 2 and 3 must be committed to ensuring the quality of the units and qualifications they deliver.

The Edexcel quality assurance processes for these qualifications will depend on the method of assessment chosen by the centre.

Centre quality assurance and assessment is monitored and guaranteed by Edexcel through the quality review process.

For centres choosing to assess the qualification purely by onscreen multiple-choice tests, the Edexcel quality assurance processes will involve:

- centre approval for those centres not already recognised as a centre for BTEC qualifications
- approval for the Edexcel BTEC Level 2 and 3 qualifications and units.

For centres choosing to assess the qualification by a portfolio of evidence, or a combination of a portfolio and/or onscreen multiple-choice tests, the Edexcel quality assurance processes will involve:

- centre approval for those centres not already recognised as a centre for BTEC qualifications
- approval for the Edexcel BTEC Level 2 and 3 qualifications and units
- **compulsory** Edexcel-provided training and standardisation for internal verifiers and assessors leading to the accreditation of lead internal verifiers via the OSCA system
- quality review of the centre verification practice
- centre risk assessment by Edexcel of overarching processes and quality standards
- remedial training and/or assessment sampling for centres identified through standardisation or risk assessment activities as having inadequate quality, assessment or internal verification processes.

For centres using this qualification as a component of an Apprenticeship the Edexcel quality assurance processes will involve:

- gaining centre recognition and qualification approval if a centre is not currently approved to offer Edexcel qualifications
- annual visits by occupationally competent and qualified Edexcel Standards Verifiers for sampling of internal verification and assessor decisions for the occupational sector
- the provision of support, advice and guidance towards the achievement of National Occupational Standards.

Approval

Centres are required to declare their commitment to ensuring the quality of the programme of learning and providing appropriate assessment opportunities for learners that lead to valid and accurate assessment outcomes. In addition, centres will commit to undertaking defined training and online standardisation activities.

Centres already holding BTEC approval are able to gain qualification approval online. New centres must complete a centre approval application.

Quality Assurance Guidance

Details of quality assurance for Edexcel BTEC Level 2 and 3 qualifications are set out in centre guidance which is published on our website (www.edexcel.com).

Programme design and delivery

Mode of delivery

Edexcel does not normally define the mode of delivery for Edexcel BTEC Entry to Level 3 qualifications. Centres are free to offer the qualifications using any mode of delivery (such as full time, part time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must ensure that learners have appropriate access to the resources identified in the specification and to the subject specialists delivering the units. This is particularly important for learners studying for the qualification through open or distance learning.

Learners studying for the qualification on a part-time basis bring with them a wealth of experience that should be utilised to maximum effect by tutors and assessors. The use of assessment evidence drawn from learners' work environments should be encouraged. Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to ensure a course relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- including sponsoring employers in the delivery of the programme and, where appropriate, in the assessment
- linking with company-based/workplace training programmes
- making full use of the variety of experience of work and life that learners bring to the programme.

Resources

Edexcel BTEC Level 2 and 3 qualifications are designed to give learners an understanding of the skills needed for specific vocational sectors. Physical resources need to support the delivery of the programme and the assessment of the learning outcomes, and should therefore normally be of industry standard. Learning resources also need to support the delivery of the programme and the assessment of the learning outcomes using multiple-choice questions. Staff delivering programmes and conducting the assessments should be familiar with current practice and standards in the sector concerned. Centres will need to meet any specific resource requirements to gain approval from Edexcel.

Where specific resources are required these have been indicated in individual units in the *Essential resources* sections.

Delivery approach

It is important that centres develop an approach to teaching and learning that supports the vocational nature of Edexcel BTEC Level 2 and 3 qualifications, the mode of delivery and assessment through multiple choice questions. Specifications give a balance of practical skill development and knowledge requirements, some of which can be theoretical in nature. Tutors and assessors need to ensure that appropriate links are made between theory and practical application and that the knowledge base is applied to the sector. This requires the development of relevant and up-to-date teaching materials that allow learners to apply their learning to actual events and activity within the sector. Maximum use should be made of learners' experience.

All of the content in each externally assessed unit is mandatory. Therefore tutors must ensure that learners have covered all the content before sitting any external test.

Additional and specialist learning

Additional and Specialist Learning (ASL) consists of accredited qualifications at the same level as, or one level above a 14-19 Diploma course of study, which have been approved under Section 96 of the Learning and Skills Act 2000. The ASL may include BTEC qualifications which are also available to learners not following a 14-19 Diploma course of study.

ASL qualifications are listed on the 14-19 Diploma Catalogue which is available on the Register of Regulated Qualifications (www.ofqual.gov.uk). The catalogue will expand over time as more qualifications are accredited and approved.

Centres undertaking, or preparing to undertake, ASL should refer regularly to the Edexcel website for information regarding additions and the 14-19 Diploma Catalogue for the latest information.

Functional skills

Edexcel Level 2 and 3 BTEC Specialist qualifications give learners opportunities to develop and apply functional skills. Functional skills are, however, not required to be achieved as part of the BTEC Specialist qualification(s) rules of combination. Functional skills are offered as stand-alone qualifications.

Access and recruitment

Edexcel's policy regarding access to its qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from any barriers that restrict access and progression
- there should be equal opportunities for all wishing to access the qualifications.

Centres are required to recruit learners to BTEC qualifications with integrity. This will include ensuring that applicants have appropriate information and advice about the qualifications and that the qualification will meet their needs. Centres should take appropriate steps to assess each applicant's potential and make a professional judgement about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Edexcel's policy on learners with particular requirements.

Centres will need to review the entry profile of qualifications and/or experience held by applicants, considering whether this profile shows an ability to progress to a higher level qualification.

Restrictions on learner entry

The Edexcel BTEC Level 2 and 3 Awards and Certificates in Customer Service are accredited on the QCF for learners aged 14 and above.

Access arrangements and special considerations

Edexcel's policy on access arrangements and special considerations for BTEC and Edexcel NVQ qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the 1995 Disability Discrimination Act and the amendments to the Act) without compromising the assessment of skills, knowledge, understanding or competence.

Further details are given in the policy document *Access Arrangements and Special Considerations for BTEC and Edexcel NVQ Qualifications*, which can be found on the Edexcel website (www.edexcel.com). This policy replaces the previous Edexcel policy (Assessment of Vocationally Related Qualifications: Regulations and Guidance Relating to Learners with Special Requirements, 2002) concerning learners with particular requirements.

Recognition of Prior Learning

Recognition of Prior Learning (RPL) is a method of assessment (leading to the award of credit) that considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning.

Edexcel encourages centres to recognise learners' previous achievements and experiences whether at work, home or at leisure, as well as in the classroom. RPL provides a route for the recognition of the achievements resulting from continuous learning.

RPL enables recognition of achievement from a range of activities using any valid assessment methodology. Provided that the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable for accrediting a unit, units or a whole qualification. Evidence of learning must be sufficient, reliable and valid.

Unit format

All units in Edexcel BTEC Level 2 and 3 Specialist qualifications have a standard format. The unit format is designed to give guidance on the requirements of the qualification for learners, tutors, assessors and those responsible for monitoring national standards.

Each unit has the following sections.

Unit title

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

Unit code

Each unit is assigned a QCF unit code that appears with the unit title on the National Database of Accredited Qualifications.

QCF level

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

Credit value

All units have a credit value. The minimum credit value that may be determined for a unit is one, and credits can only be awarded in whole numbers. Learners will be awarded credits for the successful completion of whole units.

Guided learning hours

Guided learning hours are defined as all the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim being studied on a programme. This definition includes lectures, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes time spent by staff assessing learners' achievements. It does not include time spent by staff in day-to-day marking of practice multiple-choice questions, assignments or homework where the learner is not present.

Unit aim

The aim provides a clear summary of the purpose of the unit and is a succinct statement that summarises the learning outcomes of the unit.

Unit introduction

The unit introduction gives the reader an appreciation of the unit in the vocational setting of the qualification, as well as highlighting the focus of the unit. It gives the reader a snapshot of the unit and the key knowledge, skills and understanding gained while studying the unit. The unit introduction also highlights any links to the appropriate vocational sector by describing how the unit relates to that sector.

Learning outcomes

The learning outcomes of a unit set out what a learner is expected to know, understand or be able to do as the result of a process of learning.

Assessment criteria

The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or set of learning outcomes, has been achieved. The learning outcomes and assessment criteria clearly articulate the learning achievement for which the credit will be awarded at the level assigned to the unit.

Unit content

The unit content identifies the breadth of knowledge, skills and understanding needed to design and deliver a programme of learning to achieve each of the learning outcomes. This is informed by the underpinning knowledge and understanding requirements of the related National Occupational Standards (NOS), where relevant. The content provides the range of subject material for the programme of learning and specifies the skills, knowledge and understanding required for achievement of the unit.

Each learning outcome is stated in full and then the key phrases or concepts related to that learning outcome are listed in italics followed by the subsequent range of related topics.

Relationship between content and assessment criteria

The learner should have the opportunity to cover all the unit content.

It is not a requirement of the unit specification that all of the content is assessed. However, the indicative content will need to be covered in a programme of learning in order for learners to be able to meet the standard determined in the assessment criteria.

Content structure and terminology

The information below shows how the unit content is structured and gives the terminology used to explain the different components within the content.

- Learning outcome: this is shown in bold at the beginning of each section of content.
- Italicised sub-heading: it contains a key phrase or concept. This is content which must be covered in the delivery of the unit. Colons mark the end of an italicised sub-heading.

- Elements of content: the elements are in plain text and amplify the sub-heading. The elements must be covered in the delivery of the unit. Semi-colons mark the end of an element.
- Brackets contain amplification of content which must be covered in the delivery of the unit.
- 'eg' is a list of examples, used for indicative amplification of an element (that is, the content specified in this amplification could be covered or could be replaced by other, similar material).

Essential guidance for tutors

This section gives tutors additional guidance and amplification to aid understanding and a consistent level of delivery and assessment. It is divided into the following sections.

- *Delivery* – explains the content's relationship to the learning outcomes and offers guidance about possible approaches to delivery. This section is based on the more usual delivery modes but is not intended to rule out alternative approaches.
- *Assessment* – gives amplification about the nature and type of evidence that learners need to produce in order to achieve the unit. This section should be read in conjunction with the assessment criteria.
- *Essential resources* – identifies any specialist resources needed to allow learners to generate the evidence required for each unit. The centre will be asked to ensure that any requirements are in place when it seeks approval from Edexcel to offer the qualification.
- *Indicative resource materials* – gives a list of learner resource material that benchmarks the level of study.

Units

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Unit 1: Understanding Good Customer Service

Unit code: Y/602/1353

QCF Level 2: BTEC Specialist

Credit value: 6

Guided learning hours: 40

Unit aim

This unit aims to provide learners with knowledge of customers and their customer service expectations. Learners will develop knowledge of the part that customer service practitioners are expected to play in delivering customer service within organisations, best practice in the delivery of customer service and the impact legislation and regulation have on customer service.

Unit introduction

This unit aims to develop and broaden the learner's understanding of customer service. Learners will look into the different types of internal and external customer and the specific needs that each may have. Learners will develop their knowledge of their organisation's services and products and gain a broad understanding of typical customer service problems they may encounter and how best to deal with them. They will also look at how external factors such as legislation can affect the service offered. It is also important to understand how organisations set internal policies and procedures to ensure that customer service standards are maintained by staff.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Know the characteristics of customers and their expectations</p>	<p>1.1 identify the differences between internal and external customers</p> <p>1.2 describe the connection between customer expectations and customer satisfaction in customer service</p> <p>1.3 outline the main characteristics of typical customers</p> <p>1.4 identify aspects of customer service that may exceed customer expectations</p> <p>1.5 identify aspects of customer service that could fall short of customer expectations</p>
<p>2 Know how customer service is delivered in organisations</p>	<p>2.1 identify the different responsibilities of people involved in the delivery of customer service</p> <p>2.2 identify the different job roles involved in the delivery of customer service</p> <p>2.3 state the kinds of information needed to deliver good customer service</p> <p>2.4 identify common sources of information that customer service practitioners can use to find information about organisations</p> <p>2.5 explain how customers' service experience is affected by the way customer service practitioners behave</p> <p>2.6 outline typical customer service problems</p> <p>2.7 identify to whom customer service problems should be reported</p>

Learning outcomes	Assessment criteria
<p>3 Know customer service practices and procedures</p>	<p>3.1 describe why teamwork is essential to good customer service practice</p> <p>3.2 identify organisational practices and procedures that relate to customer service work</p> <p>3.3 describe why organisational procedures are important to good customer service</p> <p>3.4 state when customer service issues should be referred to someone in authority</p> <p>3.5 state how to refer customer service issues to someone in authority</p> <p>3.6 outline how customer service practitioners protect the security of customers and their property</p> <p>3.7 outline how customer service practitioners protect the security of information about customers</p>
<p>4 Know legislation and external regulations that relate to customer service</p>	<p>4.1 identify health and safety responsibilities relating to customer service work</p> <p>4.2 outline the responsibility of customer service practitioners to treat customers equally</p> <p>4.3 outline requirements relating to the protection of customer data</p> <p>4.4 outline requirements relating to the confidentiality of organisational data</p> <p>4.5 outline how legislation affects customer service work</p> <p>4.6 outline how external regulations affect customer service work</p>

Unit content

1 Know the characteristics of customers and their expectations

Internal customers: colleagues; supervisors; staff; suppliers; agents; staff teams

External customers: existing; new; individuals; groups; businesspeople; non-English speaking; different ages; different cultures; gender; families; with special needs (visual, hearing, mobility impairments)

Differences: internal (working for same organisation, suppliers, agents); external (purchasers, buying goods/service)

Customer expectations and satisfaction: definition of customer service; identifying customer needs; value for money; accuracy and reliability; providing information and advice; providing assistance and help; organisational targets; dealing with special needs; dealing with problems; health and safety; security

Typical customers: main characteristics (purchasing goods/services, needing goods/service, seeking advice, having problems, making queries)

Exceeding customer expectations: value for money; providing information and advice quickly; providing additional help and assistance; dealing promptly with problems; discounts; offer of additional products or services; exceptional help and assistance for customers with special requirements

Falling short of customer expectations: unable to meet expectations; unable to deliver on promise; lack of communication; rude; talking to others; lack of care; no explanation

2 Know how customer service is delivered in organisations

Responsibilities: supervisor (training, assessing, day-to-day responsibility, supervision, source of help, dealing with queries/problems); line manager (supervision, greater responsibility, greater authority, source of information, checking, audit)

Customer service roles: receptionist; contact centre worker; shop assistant; delivery driver; staff not offering direct customer service (cleaners, gardeners, engineers); entrance supervisors; account manager

Information: types (informative, instructive, directive, pictorial, warning, safety); sources (brochures, leaflets, intranet, internet, web pages, colleagues, managers, supervisors, customers, trade organisations, press, log of customer queries)

Behaviour: showing concern (showing customer you empathise with them, expressing sympathy, offering to deal with problem immediately, letting customer know you care); listening (nodding, saying yes, repeating what customer says to check understanding); positive body language (smile, handshake, eye contact, position of arms, position of feet, facial expression, tone of voice, stance, nodding, positive listening, steepling fingers, personal space); identifying the reason(s) for dissatisfaction (faulty goods, non delivery of goods/service, not up to customer expectations, unable to meet expectations, unable to deliver on promise, lack of communication, rude, talking to others, lack of care, no explanation); apologising (sorry, explaining reasons, offering to correct fault, offering to put right the problem, offering refunds, offering new product); remaining calm and in control (not losing temper, reassuring the customer you are doing all you can to help, ignore distractions); consulting a supervisor if needed; solving the problem; agreeing solution with customer; ensuring action taken; recording details; effect on customer of behaviour (they see you care, you are taking their problem seriously, retaining goodwill, appearing professional); effects (causing offence, not meeting customer expectations, disappointing customers, customer complaints, losing customer loyalty)

Typical customer service problems: complaints; faults; deliveries; not fit for purpose; poor service from internal customers; credit issues; card issues

Reporting customer service problems: to supervisor; to suppliers; to customer service department; to management; to person responsible for problem; to persons able to resolve the problem

3 Know customer service practices and procedures

Teamwork: to customer (consistent service, effective cover for absences, support of different skills, ability to meet customer expectations by working together); to organisation (cross-fertilisation of ideas, consistency, effective cover for absences); to self (help, support, using expertise/experience of team members, impact on motivation)

Practices and procedures: keeping accurate records; answering telephones in a professional manner; appropriate staff appearance and dress; dealing with enquiries; handling financial transactions; refunds policy; medical emergencies; complaint handling; contractual agreements with customers; dealing with offensive behaviour

Importance: ensuring consistent and reliable service; compliance with legal obligations; enhanced reputation; customer satisfaction; efficient operation of organisation; corporate identity

Referring to someone in authority: when (outside own expertise, outside own authority, seeking advice, unable to deal with customer); how (face to face, in writing, telephone, text, email)

Security of customers and their property: company liability for accidents; for faulty goods; for ineffective service; for loss or damage whilst in organisation's care; duty of care to customer; keeping correct records of customers' property; compliance with health and safety laws (safety of premises, holes in flooring, loose fittings, open wiring, wet floors); ensuring safety of equipment (disconnecting before working on it, disconnecting if faulty, using manufacturer's instructions, safety checks in line with manufacturer's instructions, being trained in proper use); ensuring hygienic work practice (washing hands and fingernails, keeping surfaces clean, use of hair nets/caps, washing crockery, cutlery and pots at correct temperature, use of correct chopping boards, cooking at correct temperature); security alert (taking messages, evacuation procedure, meeting points); compliance with Health and Safety at Work Act (everyone's responsibility, identifying where customers could be injured, risk analysis, informing people of dangers, signs on wet floors); compliance with fire regulations (exits signed, location of fire extinguishers, fire practice, evacuation procedure, meeting points); bomb alert (taking messages, evacuation procedure, meeting points)

Security of customer information: address; telephone number security is protected; spending patterns; debt; credit and debit card details; secure site for card use; details of purchases; data protection (follow requirements of Data Protection Act, written documents locked away, access limited to authorised persons, password for access to computer information, only recording relevant information, not passing information to unauthorised third parties, checking authority)

4 Know legislation and external regulations that relate to customer service

Health and safety: compliance with Health and Safety at Work Act (everyone's responsibility, identifying where customers could be injured, risk analysis, informing people of dangers, signs on wet floors); compliance with fire regulations (exits signed, location of fire extinguishers, fire practice, evacuation procedure, meeting points); bomb alert (taking messages, evacuation procedure, meeting points); Control of Substances Hazardous to Health Regulations 1994 (safe handling of chemicals, protective clothing must be worn); compliance with Health and Safety (Display Screen Equipment) Regulations

Treating customers equally: equal opportunities (treating everyone as equal, making allowances for customers with disability, treating both genders equally); racial and gender discrimination (not discriminating because of race, or sexual orientation); disability discrimination (access, 'seeing the person, not the disability', induction loops); diversity; avoiding assumptions; compliance with Disability Discrimination Act (unlawful to treat people with disabilities less favourably for a reason related to their disability, requirement to make 'reasonable adjustments' for people with disabilities); compliance with Race Relations Act (protection against discrimination on the grounds of race, colour, nationality, ethnic and national origin in the fields of employment, the provision of goods and services, education and public functions); compliance with Sex Discrimination Act (protection against discrimination on the grounds of sex, marital status, gender reassignment); compliance with Equality Act 2010

Importance of confidentiality: customer data (address, telephone number, spending patterns, debt, credit and debit card details, details of purchases, use to criminals, use to fraudsters, use to competitors); organisational data (sales figures, profit margins, use to competitors; use to criminals); staff data (addresses, home telephone numbers, use by criminals, head-hunters, fraudsters); compliance with Data Protection Act (written documents kept under lock, access limited to authorised persons, password for access to computer information, only recording relevant information, not passing information to unauthorised third parties, checking authority)

Legislation: Financial Services and Markets Act 2000 (customers protected against misselling, protection against fraud, seven-day opt out from agreement clause); Trade Descriptions Act 1968 (goods must be fit for purpose, sales staff must give accurate descriptions, services must be as described); Control of Substances Hazardous to Health Regulations 1994 (safe handling of chemicals, protective clothing must be worn); Working Time Directive 1999 (limited 48 hours a week); working with computers (ergonomic seating, required breaks, need for eye tests); Consumer Credit Act 1974 (14-day opt-out clause for customers, protection for customer if supplier fails to deliver goods/services); Consumer Protection (Distance Selling) Regulations 2000 (give consumers clear information on details of the goods or services offered, delivery arrangements and payment, the supplier's details, the consumer's cancellation right before they buy, cooling-off period of seven working days, providing information in writing); Supply of Goods and Services Act 1982 (carrying out a service with reasonable care and skill within a reasonable time at no more than a reasonable charge, compensation for failure to carry out contract, goods supplied must be as described, of satisfactory quality and fit for purpose); Equality Act 2010;

Race Relations Act (protection against discrimination on the grounds of race, colour, nationality, ethnic and national origin in the fields of employment, the provision of goods and services, education and public functions); Health and Safety (Display Screen Equipment) Regulations; Disability Discrimination Act (unlawful to treat people with disabilities less favourably for a reason related to their disability, requirement to make 'reasonable adjustments' for people with disabilities); Sex Discrimination Act (protection against discrimination on the grounds of sex, marital status, gender reassignment)

Effect of external regulations: organisational procedures (keeping records, dealing with enquiries, handling financial transactions, refunds policy, contractual agreements with customers); trade body codes of conduct (Institute of Customer Service, ABTA, Financial Service Authority); meeting National Occupational Standards (Institute of Customer Service, NVQs); effects (pressures on time, increasing costs, increasing levels of professionalism, protecting organisation from litigation, maintaining company image, meeting legal requirements, maintaining up-to-date records)

Essential guidance for tutors

Delivery

This unit should be delivered in a way that develops learner knowledge and understanding of what constitutes good customer service. Learners should know and understand customer expectations of good customer service, including product knowledge and procedures.

Learners should be encouraged to engage with customers, employers and, where possible, other employees to gain knowledge and understanding of good customer service.

Perspectives on good customer service gained through engaging with customers, employers and employees, rather than through a purely theoretical context, are key. This should be made possible by learners serving customers and working with other customer service deliverers, where possible, and through the use of guest speakers and video/CD training programmes.

This unit could be delivered through distance learning. However, this will involve additional, and different, considerations, such as planning, and other measures to ensure learners can gain the required knowledge and understanding.

Assessment

This unit can be assessed externally through an onscreen multiple-choice assessed test or internally.

A variety of assessment methods could be used. Learners could produce written reports or give verbal presentations, supported by witness testimony. Other alternatives could be logbooks or workbooks completed in the workplace or during visits.

Essential resources

There are no essential resources required for this unit.

Indicative resource materials

Textbooks

Bradley S – *S/NVQ Level 2 Customer Service* (Heinemann, 2007)
ISBN 139780435465292

Carlaw P & Deming VK – *The Big Book of Customer Service Training Games*
(McGraw Hill, 2007) ISBN 139780077114763

Leland K and Bailey K – *Customer Service for Dummies* (John Wiley & Sons, 2006)
ISBN 139780471768692

Timm P – *Customer Service: Career Success Through Customer Loyalty*
(Prentice Hall, 2010) ISBN 139780135063972

Journal

Customerfirst (Institute of Customer Service)

Websites

Council for Administration

www.cfa.co.uk

Institute of Customer Service

www.instituteofcustomerservice.com

Unit 2: Delivering Effective Customer Service

Unit code: A/602/1359

QCF Level 2: BTEC Specialist

Credit value: 4

Guided learning hours: 25

Unit aim

This unit aims to develop learners' understanding of the importance of effective and reliable customer service. Learners will develop knowledge of appropriate behaviour when delivering effective customer service and of how to ensure that the customer service is reliable.

Unit introduction

In this unit learners' will develop knowledge and understanding of customer service and their ability to deal with customers in an effective and reliable way. The unit also emphasises the importance of knowing how to address customers in an appropriate manner and of using positive body language.

The unit will help learners to understand the importance of being honest with customers and of ensuring that any promises made will be kept or an adequate explanation will be given to the customer. This unit also helps learners to identify the limits of their authority and how to deal with dissatisfied customers.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Know how to deliver reliable customer service</p>	<p>1.1 outline how to prepare to deal with customers</p> <p>1.2 identify how to make realistic customer service promises to customers</p> <p>1.3 describe how to ensure promises made to customers balance the needs of organisations and customers</p> <p>1.4 describe how to inform customers when promises cannot be kept due to unforeseen circumstances</p> <p>1.5 outline how to keep customers informed to support reliable customer service</p> <p>1.6 match characteristics of different customers to different customer service expectations</p> <p>1.7 identify poor customer service</p> <p>1.8 outline how poor customer service could be improved</p>
<p>2 Know how to behave towards to customers</p>	<p>2.1 outline appropriate ways to greet customers</p> <p>2.2 describe how to appear positive to customers at all times</p> <p>2.3 describe how to show customers respect under any circumstances</p> <p>2.4 state how to complete communication with customers</p> <p>2.5 identify positive body language</p> <p>2.6 identify negative body language</p>

Learning outcomes	Assessment criteria
3 Know how to deal with customers' queries, requests and problems	3.1 describe how to deal with queries and requests from customers 3.2 identify the limitations of roles of customer service practitioners 3.3 identify who is able to provide assistance to customer service practitioners 3.4 identify how to recognise problems from what customers say or do 3.5 describe how to speak to dissatisfied customers 3.6 identify types of behaviour that may make problems worse 3.7 outline good practice procedures that should be followed when dealing with customer related issues

Unit content

1 Know how to deliver reliable customer service

Preparing to deal with customers: preparing work area (clean, tidy, safe, well lit, well stocked, sufficient resources, information at hand, appropriately dressed)

Realistic promises: within authority; within ability to deliver; knowing you can deliver; knowing delivery dates; availability of goods

Balancing needs: customer expectations (good service, prompt service, goods and services being fit for purpose); expectations of organisation (minimising costs, maximising profits, maintaining reputation, delivering effective customer service); ability to deliver; offering alternatives; acceptability of alternatives; constraints of delivery dates

Informing customers: of broken promises (telephone, face to face, written, electronic messaging, follow-up); passing them on to other people/organisations (telephone, face to face, written, electronic messages, person with authority); apologising (saying sorry, explaining reasons, offering to correct fault, offering to put right the problem, offering refund, offering new product)

Different customer service expectations: relating to age (more formal service, need to update technology, discounts, youthful service, use of language); relating to culture (difference in expectations, unfamiliar with local culture, cultural signs, handshake, position of feet, role of women, use of language); relating to personality (quiet, outgoing, insecure, shy, fear of ridicule, lacking confidence, dour); relating to image of organisation (expensive, inexpensive, world class standards, highest standard, cheap and cheerful, 'pile 'em high – sell 'em cheap'); relating to special requirements (autism spectrums, Aspergers, disability); public image of owner; relating to residential/non-residential (local customers, customers from other towns, other countries, delivery problems, hotel guests, visitors); relating to lifestyle (trendy, traditional, dinkies, avant garde, family, carer); relating to disposable income (high, low, money rich-time poor, time rich-money poor, family); relating to social class (economic grouping A, B, C1, C2, D, E, rich, poor, working class, middle class, middle England)

Poor customer service: customers not understanding your correspondence; not speaking clearly on the telephone; being slow to respond to customer requests; not having sufficient stock; ignoring customers; talking to colleagues when customers are waiting; not showing you care about the customer's queries; not being able to deliver on promises made; unable to meet expectations; lack of communication; rude; talking to others; lack of care; no explanation

Improving customer service: identifying poor customer service; better communication (in writing, telephone, text, email, face to face); more positive body language; better procedures; efficient procedures; quicker; customer focused; less referral of queries to management/supervisor; better administration; less paperwork; more accurate provision of information; effect of others (customer, colleagues, supervisor, management, competitors)

2 Know how to behave towards customers

Greeting customers: eye contact; appropriate greeting; tone of voice; offering assistance; positive body language; appropriate form of address; use of customer's name

Being positive towards customers: using their name; sir/madam; not disagreeing; meeting their needs; being polite; offering assistance

Showing respect to customers: using their name; sir/madam; not disagreeing; being polite; showing respect under any circumstances (quiet period, busy period, when staff missing, interruptions, resources not available, supervisor/line manager/senior staff not available)

Completing communication: thanking customer; tone of voice; positive body language; appropriate form of address; use of customer's name; offering further assistance; confirmation of service

Body language: positive (smile, handshake, eye contact, open position of arms, smiling at customer, looking at customer, friendly tone of voice, calm tone of voice, positive listening); negative (scowling, lack of eye contact, folded arms, arms on hips, looking tired, talking to others, sighing, scratching)

3 Know how to deal with customers' queries, requests and problems

Dealing with queries and requests: customers (external, internal, colleagues, management); being prompt; keeping customers informed; being positive; using customer's names; being polite; sir/madam; not disagreeing; understanding needs; meeting their needs; benefits of alternative

Limits of authority: receptionist (passing on messages, directing customers to right person, keeping customer informed, limit of authority when dealing with queries, knowing what supervisor can do to help customer); contact centre operative (passing to supervisor, limit of authority when dealing with queries, knowing what supervisor can do to help customer); service deliverer (limited authority on amounts to refund, limited authority to offer free courses or wine, need to check with line manager); line manager/supervisor (greater authority to authorise refunds, can authorise discounts or free goods, supervising staff at lower level, ensuring policies and procedures are carried out); management (control of branch, authorising exceptional changes to procedures and policies)

Authorising improvements: senior management (change policies, improving procedures)

Obtaining help and information: from line manager; from colleagues; from senior management; from suppliers; from customers; from brochures; from the internet

Recognising a problem: tone of voice; negative body language; negative facial expression; type of language used; agitated customers; delivery dates; failure of supplier

Speaking to dissatisfied customers: being polite; being reassuring; explaining problem; being seen to act; showing empathy

Making problem worse: ignoring customer; arguing; disagreeing; negative body language; negative facial expressions; negative tone of voice

Organisational procedures: policies and procedures for security of personnel; data; equipment; premises; visitors; confidentiality; dealing with emergencies; existing or potential security risks; limits of own responsibility; reporting promptly and accurately to line manager; policies on customer service (customer service policy, refunds policy, staff development policy, organisational chart, codes of conduct); procedures laid down by organisations (returns procedure, refund procedure, dealing with complaints); customer service practice within organisations (when procedures are followed to detriment of customer service, when procedures are not followed to benefit of customer service); procedures for providing feedback to management (telephone, face to face, written, electronic messaging, chasing up queries, staff meetings)

Essential guidance for tutors

Delivery

This unit should be delivered in a way that develops learner knowledge and understanding of how to deliver effective customer service. Learners should know and understand appropriate behaviour to use with customers and how to deal with customer queries, requests and problems.

Learners should be encouraged to engage with customers, employers and, where possible, other employees to gain knowledge and understanding of good customer service.

Perspectives on the delivery of effective customer service gained through engaging with customers, employers and employees, rather than through a purely theoretical context, are key. This should be made possible by learners serving customers and working with other customer service deliverers, where possible, and through the use of guest speakers and video/CD training programmes.

This unit could be delivered through distance learning. However, this will involve additional, and different, considerations, such as planning, and other measures to ensure the learners can gain required knowledge and understanding.

Assessment

This unit can be assessed externally through an onscreen multiple-choice test or internally.

A variety of assessment methods could be used. Learners could produce written reports, or give verbal presentations, supported by witness testimony. Other alternatives could be logbooks or workbooks completed in the workplace or during visits.

Essential resources

There are no essential resources required for this unit.

Indicative resource materials

Textbooks

Bradley S – *S/NVQ Level 2 Customer Service* (Heinemann, 2007)
ISBN 139780435465292

Carlaw P & Deming PK – *The Big Book of Customer Service Training Games*
(McGraw Hill, 2007) ISBN 139780077114763

Leland K and Bailey K – *Customer Service for Dummies* (John Wiley & Sons, 2006)
ISBN 139780471768692

Timm P – *Customer Service: Career Success Through Customer Loyalty*
(Prentice Hall, 2010) ISBN 139780135063972

Journal

Customerfirst (Institute of Customer Service)

Websites

Council for Administration

www.cfa.co.uk

Institute of Customer Service

www.instituteofcustomerservice.com

Unit 3: Planning for Self-development in Customer Service

Unit code: T/602/1361

QCF Level 2: BTEC Specialist

Credit value: 3

Guided learning hours: 20

Unit aim

This unit aims to give learners the required knowledge to aid development in customer service. In this unit, learners will learn how to improve personal performance in customer service and how to develop customer service skills.

Unit introduction

This unit is designed to develop learners' customer service skills. Learners are expected to reflect on their experience and knowledge, both as a deliverer and as a recipient of customer service. Learners are required to produce a personal development plan. Delivering this unit at the beginning of the programme is important so learners are able to review their development throughout the programme.

Learning outcomes 2 and 3 should be completed towards the end of the learner's programme when they are in a position to review their progress and improved customer service skills. This could be included in a staff appraisal. Learners should have become aware of the need to continually develop their customer service skills throughout their career and have learned how to complete a Continuous Professional Development Plan (CPD). They will also have identified sources of information which will help them to develop their customer service skills.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Know how to improve personal performance in customer service</p>	<p>1.1 identify common strengths and weaknesses for customer service practitioners</p> <p>1.2 identify common development needs for customer service practitioners</p> <p>1.3 state how to draw up development objectives to improve performance in customer service roles</p> <p>1.4 outline how experiences of customer service can help to develop customer service performance</p> <p>1.5 identify appropriate people to give feedback on customer service performance</p> <p>1.6 outline the process of reviewing and updating customer service personal development plans</p> <p>1.7 describe the value of discussing personal customer service learning with others</p>

Learning outcomes	Assessment criteria
<p>2 Know how to develop customer service skills</p>	<p>2.1 outline development activities that could form part of a personal development plan</p> <p>2.2 outline how to review personal strengths and development needs to aid personal development in customer service</p> <p>2.3 outline how to obtain feedback from others to aid personal development in customer service</p> <p>2.4 describe how to respond to feedback to aid personal development in customer service</p> <p>2.5 state common sources of information that can be used to extend knowledge of organisations' products and services</p> <p>2.6 identify sources of information on customer service knowledge and skills that can help customer service practitioners to develop</p>

Unit content

1 Know how to improve personal performance in customer service

Common strengths and weaknesses: strengths (product knowledge, experience as customer, experience in customer service, ability, qualifications, friendly, helpful personality); weaknesses (lack of product knowledge, inappropriate qualifications, shy of customers, lack of confidence)

Common development needs: qualifications; experience; on the job training; better product knowledge; gain confidence; new experiences

Drawing up development objectives: identifying strengths and weaknesses; developing strengths; identifying ways to overcome weaknesses; training courses; gaining a National Vocational Qualification (NVQ); continuous professional development plan; timeframe; identifying who can help

Effect of experience on development: delivering customer service (more confidence, better product knowledge, better knowledge of procedures); as a customer (effective service, better able to meet needs, expert advice, quicker service)

Obtaining feedback from appropriate people: line manager; buddy; supervisor; customer; supplier; assessor; tutor; appraisals

Reviewing and updating personal development plan: planned review dates; appraisal; regular checks to update; planned assessments for NVQ; review with assessor/tutor

Discussing learning: with others (line managers, mentors, others doing similar jobs, colleagues, buddy, tutor, assessor, internal verifier); benefits (ensuring accuracy of knowledge, learning from others, checking understanding, achieving qualification)

2 Know how to develop customer service skills

Development activities: appraisal; progress review with line manager; attending training courses; completion of NVQ portfolio; textbooks and videos; reading *Customerfirst* journal

Reviewing development needs: discussing with appropriate people (assessor, colleagues, line manager, supervisor, mentor); appraisals; tutorials; better customer service feedback; more confidence; better product knowledge; progress towards qualification; completion of NVQ portfolio

Feedback: useful (able to use in development plan, able to identify progress in own development); constructive comments (from colleagues, supervisor, customers, assessor); progress with qualifications; sources (from customers, from managers, from colleagues, staff appraisal, comment cards); methods of obtaining feedback (asking for feedback, appraisal, comments from assessor)

How to respond to feedback: response to customers (more experience, more knowledge, better customer service, more confident, repeat customers); response to colleagues (being able to offer more help, more confident service, needing less supervision, giving colleagues confidence to work with, being able to allow more responsibility); response to management (effective employee, increase in customer satisfaction, increase in sales, allowing more responsibility)

Common sources of information: organisations' services and products (internal organisational updates, updates from suppliers, updates from other external customers, company web pages, internal colleagues, managers); knowledge and skills (textbooks, *Customerfirst* journal, customer service videos, web pages, trade publications, Institute of Customer Service, managers, mentors)

Essential guidance for tutors

Delivery

This unit should be delivered in a way that develops learner knowledge and understanding of how to develop their customer service skills. Learners will develop a personal continuous development plan (CPD) aimed at improving their customer service skills.

Learners should be encouraged to engage with customers, employers and, where possible, other employees to gain knowledge and understanding to further their develop of effective customer service skills.

Perspectives on improving customer service skills gained through engaging with customers, employers and employees, rather than through a purely theoretical context, are key. This should be made possible by learners serving customers; and working with other customer service deliverers and through discussions with their line manager.

This unit could be delivered through distance learning. However, this will involve additional, and different, considerations, such as planning, and other measures to ensure learners can gain the required knowledge and understanding.

Assessment

This unit can be assessed externally through an onscreen multiple-choice test or internally assessed.

A variety of assessment methods could be used. Learners could produce written reports or give verbal presentations, supported by witness testimony. Other alternatives could be logbooks or workbooks completed in the workplace or during visits.

Essential resources

There are no essential resources required for this unit.

Indicative resource materials

Textbook

Bradley S – *S/NVQ Level 2 Customer Service* (Heinemann, 2007)
ISBN 139780435465292

Journal

Customerfirst (Institute of Customer Service)

Websites

Council for Administration

www.cfa.co.uk

Institute of Customer Service

www.instituteofcustomerservice.com

Unit 4: Providing Excellent Customer Service

Unit code: K/602/1597

QCF Level 3: BTEC Specialist

Credit value: 6

Guided learning hours: 40

Unit aim

This unit aims to develop learners' understanding of customer service offers and how they are designed to meet the needs of customers and the organisation. Learners will also develop knowledge of the factors that can affect the customer service offer including procedures, regulations and legislation.

Unit introduction

This unit will introduce learners to customer service offers. Customers need to feel that they are genuinely being provided with high levels of service and that customer service staff will make every possible effort to meet or exceed their expectations. Learners will explore how organisations' service offers are designed to meet these expectations.

This unit addresses issues relating to customer service administration. Learners will develop their understanding of a range of legislation and regulations and how they affect the delivery of customer service. They will also examine how codes of practice can contribute to delivering excellent customer service.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Know what makes good customer service</p>	<p>1.1 explain the importance of effective teamwork for the delivery of excellent customer service</p> <p>1.2 identify methods of dealing with different types of customers to achieve customer satisfaction</p> <p>1.3 explain the importance of effective communication in the delivery of excellent customer service</p> <p>1.4 describe how customer service practitioners can ensure their communication with diverse groups of customers is effective</p>
<p>2 Understand the value of good customer service</p>	<p>2.1 explain how customers form their expectations of customer service</p> <p>2.2 describe how customer service can contribute to best value in organisations</p> <p>2.3 state how customer service can provide a competitive advantage for commercial organisations</p> <p>2.4 outline the importance of continuous improvement within customer service</p>
<p>3 Know about customer service offers</p>	<p>3.1 describe how customer service offers are designed to meet customer expectations</p> <p>3.2 identify how service offers are affected by resource limitations</p> <p>3.3 identify the impact that service offers may have on different people in the service chain</p> <p>3.4 outline why organisations need to balance customer satisfaction with organisational goals</p>

Learning outcomes	Assessment criteria
<p>4 Understand factors affecting the service offers of organisations</p>	<p>4.1 explain the importance of following organisational procedures in the delivery of customer service</p> <p>4.2 compare the different approaches to customer service across industries</p> <p>4.3 describe features of services or products that can influence customer service delivery</p> <p>4.4 justify ethical and value based approaches of organisations to customer service</p> <p>4.5 explain how personal behaviour affects the success of any changes to customer service delivery</p> <p>4.6 outline legislation that impacts on customer service</p> <p>4.7 outline external regulation that impacts on customer service</p>
<p>5 Understand how organisational policies and procedures can impact on customer service improvements</p>	<p>5.1 outline types of organisational policies and procedures that need to be taken into account when proposing improvements in customer service</p> <p>5.2 explain how to gain approval to change customer service procedures</p> <p>5.3 identify the limitations of the roles of customer service practitioners</p> <p>5.4 identify who needs to be involved if customer service practitioners cannot authorise improvements alone</p> <p>5.5 explain strategies that can be used to involve colleagues or service partners in the implementation of improvements</p>

Unit content

1 Know what makes good customer service

Importance of teamwork: to customer (consistent service, effective cover for absences, support of different skills); to organisation (cross-fertilisation of ideas, consistency, effective cover for absences); to self (help, support, expertise, motivation)

Customer types: regular; loyal; first time; different language or culture; disability; customers unfamiliar with the organisation; behaviours (complaining, aggressive, demanding, submissive, discriminatory); personalities (quiet, outgoing, insecure, shy, fear of ridicule, lacking confidence, dour, retiring, forceful, dominant); those with special requirements (autism spectrums, elderly, vision impaired, hearing impaired); methods of dealing with customers (maintaining professionalism, ensuring customer understanding, establishing confidence, empathising with customer, ensuring customer is comfortable, being non-judgemental, asking open questions about customer requirements, listening; using induction loops; using minicom; using Braille; using large text; providing leaflets in a variety of languages)

Effective communication: importance (delivering effective customer service, meeting customer expectations, creating a favourable image, avoiding mistakes and errors, avoiding customer complaints, developing customer confidence, ensuring understanding); with diverse groups of customers (regular, loyal, first time, different language or culture, customers unfamiliar with the organisation, vision impaired, hearing impaired); formal; informal; written; legibility; face to face; telephone; electronic; body language; presentation; listening (eye contact, showing understanding, repeating back); asking open questions about customer requirements; using induction loops; using minicom; using Braille; using large text; providing leaflets in a variety of languages

2 Understand the value of good customer service

Expectations: anticipation of good service; reliable information or service; offering different options; impact of advertisements (company image, expectations, desire, inform); reputation (perception of service offer, public relations); word of mouth; recommendations from others

Best value: commitment to effective customer service; responsiveness to customer needs; management of resources for efficient customer service; appraisal for staff development; competitiveness; accountability to customers; equal opportunities of service for customers

Competitive advantage: reliability of procedures; speed of response; accuracy of knowledge/information; new products and/or services; new systems or changes to existing systems; implications of cost, benefits, time and resources

Importance of continuous improvement: deliver more efficient customer service; to better meet customer needs; improve image; improve market share; improve profits; stay ahead of the competition

3 Know about customer service offers

Customer service offer: extent and limits (what can be done to meet customer needs, what cannot be done to meet customer needs); price and service (what differentiates your offer from that of competitors); something over and above what an organisation will do for its customers

Effect of resource limitations on service offers: financial (loss of sales, loss of income, higher costs); staffing (shortage of staff, untrained staff); limitations on offer (unavailability of goods and services, staff shortages, limited space); cost of implementation (staff training, increased staffing, advertising, corporate identity development costs, cost of resources)

Impact of service offers: meeting customer needs; improved customer satisfaction; competitive advantage; different people in the service chain (customer, salesperson, service deliverer, line manager, delivery organisation, logistics supplier, supplier of goods)

Balancing customer satisfaction with organisational goals: balance between costs and income; balance between cost effective delivery and customer needs; customer satisfaction (customer perception, customer needs, effective service, efficient service); financial goals (increased income, earnings, profit, turnover); reputational concerns (loss of image, loss of customers to competitors, negative publicity)

4 Understand factors affecting the service offers of organisations

Importance of following organisational rules and procedures: ensuring customers are treated fairly; ensuring safety of staff and customers; reducing errors; avoiding litigation; maintaining secure data; ensuring consistent service; avoiding theft; avoiding fraud

Different approaches to customer service across industries: retail shops (selling tangible goods, face to face with customers, need for detailed product knowledge, need for effective selling skills); offices (offering a non-tangible service, face to face with customers, online, written customer contact, telephone customer contact, need expertise in service on offer); contact centres (telephone contact with customers, time limitations, need for detailed product knowledge, ensuring prompt delivery, selling tangible goods, offering non-tangible service); hospitality industry (serving skills for food, serving skills for drinks, need for detailed knowledge of how food has been cooked, knowledge on drinks, offering accommodation service)

Features of products or services: unique selling points (only organisation offering benefit to customer, in quality, in added value, better than competitors' products/services, celebrity endorsement); competitive price (cost plus, entry promotion, Buy One Get One Free (BOGOF), makes it less expensive for customer); trends (latest product, new, retrospective image)

Ethical and value base: anti-discriminatory (treat all customers equally, access for customers with disabilities, deaf loops, assistance for elderly); conformity with legislation (consumer protection legislation, equal opportunities legislation); integrity (honesty, maintenance of confidentiality, open, non-judgemental, keeping promises); professionalism (qualified, maintaining industry standards, high standard of service, membership of Institute of Customer Service); Corporate Social Responsibility (CSR) (saving money by reducing waste, environmental policy improves corporate image, working with the community ensures local support)

Legislation: customer service legislation (Financial Services and Markets Act 2010, Consumer Protection Act 1987, Distance Selling Regulations 2000, Sale of Goods Act 1979, Supply of Goods and Services Act 1982, Consumer Protection from Unfair Trading Regulations 2008 (CPRs), Consumer Credit Act 1974); equal opportunities legislation (Equality Act 2010, Disability Discrimination Act 1995, Race Relations Act 1976 (as amended), Sex Discrimination Act 1975); other relevant legislation (Control of Substances Hazardous to Health (COSHH) Regulations 1994, Data Protection Act 1998, Health and Safety at Work Act 1974); Working Time Directive 1999; Dignity at Work Bill 2001

Additional issues: confidentiality policy; security of personal information held on manual/computer records; effect of legislation on performance of organisation

External regulation: industry and sector-specific codes of practice; organisational and professional regulations; ethical issues and standards; organisational guidelines; implications for own organisation

5 Understand how organisational rules and procedures can impact on customer service improvements

Organisational rules and procedures: policies and procedures for security of personnel; data; equipment; premises; visitors; confidentiality; dealing with emergencies; existing or potential security risks; limits of own responsibility; reporting promptly and accurately to line manager; policies on customer service (customer service policy, refunds policy, staff development policy, organisational chart, codes of conduct); procedures laid down by organisations (returns procedure, refund procedure, dealing with complaints); customer service practice within organisations (when procedures are followed to detriment of customer service, when procedures are not followed to benefit of customer service); procedures for providing feedback to management (telephone, face to face, written, electronic messaging, chasing up queries, staff meetings)

Gaining approval for changes in procedures: supervisor; line manager; senior management by telephone; face to face; written; electronic messaging; staff meetings; through trade union

Limits of roles: service deliverer (limited authority on amounts to refund, limited authority to offer free courses or wine, need to check with line manager); line manager/supervisor (greater authority to authorise refunds, can authorise discounts or free goods, supervising staff at lower level, ensuring policies and procedures are carried out); management (control of branch, can authorise exceptional changes to procedures and policies)

Authorising improvements: senior management (change policies, improve procedures)

How to involve others: discussing with line manager; customer support; staff meetings; through trade union representative; write to senior management

Essential guidance for tutors

Delivery

This unit should be delivered in a way that develops learner knowledge and understanding of what customer service offers are. Learners should know and understand the value and effect service offers can have on the effective delivery of customer service. They should also know and understand the effect that procedures and regulations can have on the service offer.

Learners should be encouraged to engage with employers and other employees to gain knowledge and understanding of the customer service offer in their organisation.

Perspectives on effectiveness of the service offer gained through engaging with customers, employers and employees, rather than through a purely theoretical context are key. This should be made possible by learners working with other customer service deliverers, particularly line managers.

This unit could be delivered through distance learning. However, this will involve additional, and different, considerations, such as planning, and other measures to ensure learners can gain the required knowledge and understanding.

Assessment

This unit can be assessed externally through an onscreen multiple-choice test or internally assessed.

A variety of assessment methods could be used. Learners could produce written reports or give verbal presentations, supported by witness testimony. Other alternatives could be logbooks or workbooks completed in the workplace or during visits.

Essential resources

There are no essential resources required for this unit.

Indicative resource materials

Textbooks

Bradley S – *S/NVQ Level 2 Customer Service* (Heinemann, 2007) ISBN 139780435465292

Carlaw P & Deming VK – *The Big Book of Customer Service Training Games* (McGraw Hill, 2007) ISBN 139780077114763

Leland K and Bailey K – *Customer Service for Dummies* (John Wiley & Sons, 2006) ISBN 139780471768692

Timm P – *Customer Service: Career Success Through Customer Loyalty* (Prentice Hall, 2010) ISBN 139780135063972

Journal

Customerfirst (Institute of Customer Service)

Websites

Council for Administration

www.cfa.co.uk

Institute of Customer Service

www.instituteofcustomerservice.com

Unit 5: Improving Customer Service

Unit code: M/602/1598

QCF Level 3: BTEC Specialist

Credit value: 4

Guided learning hours: 25

Unit aim

In this unit learners will develop their knowledge of customer expectations and the features of products and services that customers find attractive. They will develop knowledge of procedures associated with dealing with customer complaints and of the importance of effective customer service.

Unit introduction

This unit is intended to enable learners to investigate customer service provision and explore how organisations can balance their needs with the needs of their customers.

The unit also enables learners to describe the complaints procedure and identify how a complaint could be handled by a competent customer service practitioner. Learner will then state how organisations identify improvements in customer service.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Know the benefits of products and services to customers	1.1 describe how features of customer service offers can provide organisations with a competitive advantage 1.2 outline the purpose of offering complementary services and products to customers 1.3 identify factors that lead customers to believe that they are enjoying value for money 1.4 identify features of products and services that are seen by customers as added value 1.5 outline the benefits of making alternative solutions available to customers 1.6 outline the costs of making alternative solutions available to customers
2 Know how to process customer complaints	2.1 outline common procedures for dealing with complaints 2.2 describe how to establish if customer complaints are justified 2.3 identify solutions to customer complaints and the associated risks 2.4 identify how to change approaches to customer service to avoid future complaints being made 2.5 explain how to feedback to colleagues involved in complaints to help them avoid future complaints 2.6 describe how to keep clear records of ways that complaints are handled to avoid later misunderstandings

Learning outcomes	Assessment criteria
3 Know the importance of effective customer service	3.1 identify how to portray a positive image to reinforce organisations' competitive position 3.2 outline the importance of customer loyalty to organisations 3.3 outline how to contribute constructive ideas to improve customer service 3.4 identify how organisations' goals and targets relate to customer service 3.5 state how organisations identify improvements in customer service

Unit content

1 Know the benefits of products and services to customers

Service offers: extent and limits (resources, entry into market, market position, staff, location); price (value for money, reflecting quality, offers, cost price, price skimming); service (value for money, reflecting quality, reflecting experience of deliverer, environmental policy); competitor's offer (pricing policy, quality of goods/service, market position, reputation, location, environmental policy); something over and above what an organisation will do for its customers (go the extra mile, discounts, refund policy, open more tills if busy, environmental policy, free delivery)

Complementary services and products: to promote products; compensate for poor service; loyalty bonus; demonstration; encouraging repeat visits; being competitive

Value for money: cheaper than competitor; offering more goods/services; offering better quality than competitor; offering better customer service than competitor; customer's perception of value; customer getting more for their money

Added value: Buy One Get One Free (BOGOF); gift; free delivery; better warranty; extra service free

Alternative solutions: within organisation (alternative products, delay delivery of goods/service); outside organisations (alternative suppliers, working with competitor); when alternative solutions are required (when customer needs not met, when supplies not available)

Costs and benefits: analysis (present value of cost against present value of benefits); cost (cost of goods, cost plus, entry costs, staff time, overheads, income, effect on profit); benefits (to customer, to organisation, to staff, to suppliers, to reputation, of goodwill); alternative solutions (income against customer satisfaction of alternative goods/service, cost in customer goodwill against delay in delivery, effect on income of using alternative suppliers, benefits/loss of benefits that might accrue by working with a competitor, loss of income to keep customer goodwill)

2 Know how to process customer complaints

Dealing with complaints: listening; questioning; empathising; understanding; taking control; agreeing solutions; following up; reporting to line manager; passing on to supervisor/line manager

Establishing if complaints are justified: checking customer understanding; checking faulty goods; checking facts; checking with engineer; checking with person being complained about; refund policy; return of goods policy

Solutions to complaints: understanding (misconception, technology, not meeting customer needs); faulty goods (replace, repair, return to manufacturer, conditions of use); facts (correct misinterpretation, correct misunderstanding, reassuring customers); making use of engineer (demonstrating, product recall, replacing, repairing, returning to manufacturer, conditions of use); personal (apology, explanation, compensation, resolving problem); refund policy (no quibble, refund plus more, levels of authority to refund specific amounts, Sale of Goods Act); return of goods (policy, refund, replace, receipt, misused, time limits, level of authority); invalid customer complaints

Risk to organisation: loss of sales; loss of profit; poor public relations; loss of image; loss of competitive advantage; lack of recommendations (from customer, to prospective customers)

Avoiding future complaints: improving customer service; reviewing customer service offer; reviewing procedures; reviewing customer service policies; reviewing suppliers; training

Feeding back to colleagues: face to face; writing; telephone; text; email; with clarity; with sensitivity; ideas for improvement; ideas for avoiding future complaints

Keeping clear records: following procedures for record keeping; secure storage of information; sales; refunds; correspondence; complaints; returned goods; customer details; servicing; paper-based records; electronic records

3 Know the importance of effective customer service

Positive image: reputation; word of mouth; good media reports; public relations; sponsorship; community work; benefits (repeat business, satisfied customers, reduced complaints, meeting customer expectations, loyal customers)

Importance of customer loyalty: repeat business; satisfied customers; meeting customer expectations; word of mouth; loyalty cards; discounts; special offers

How to contribute ideas for improvements: self-implemented; line manager; staff forum; staff magazine; suggestion boxes; staff meetings; through trade unions; discussions with colleagues; comparisons with competitors

Goals and targets: sales targets (improved through good customer service, more sales through good reputation, increase in loyalty customers, increase in repeat customers due to good service); profit targets (more sales leading to more profit, more efficient customer service leading to less overheads, less complaints leading to less expense); better service leads to reduction in complaints; better service leads to better market position

Identifying improvements: surveys of customer satisfaction; monitoring complaints; mystery shoppers; increase in repeat customers

Essential guidance for tutors

Delivery

This unit should be delivered in a way that develops learner knowledge and understanding of how to improve customer service. Learners should know and understand the importance of effective customer service and how to deal with customer complaints.

Learners should be encouraged to engage with customers, employers and, where possible, other employees to gain knowledge and understanding of how effective customer service can be improved.

Perspectives on improving customer service gained through engaging with customers, employers, employees and competitors, rather than through a purely theoretical context are key.

This should be made possible by learners serving customers and working with other customer service deliverers, including investigating competitor customer service offers.

This unit could be delivered through distance learning. However, this will involve additional, and different, considerations, such as planning, and other measures to ensure learners can gain the required knowledge and understanding.

Assessment

This unit can be assessed externally through an onscreen multiple-choice test or internally assessed.

A variety of assessment methods could be used. Learners could produce written reports or give verbal presentations, supported by witness testimony. Other alternatives could be logbooks or workbooks completed in the workplace or during visits.

Essential resources

There are no essential resources required for this unit.

Indicative resource materials

Textbooks

Bradley S – *S/NVQ Level 2 Customer Service* (Heinemann, 2007)
ISBN 139780435465292

Carlaw P & Deming VK – *The Big Book of Customer Service Training Games*
(McGraw Hill, 2007) ISBN 139780077114763

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Timm P – *Customer Service: Career Success Through Customer Loyalty*
(Prentice Hall, 2010) ISBN 139780135063972

Journal

Customerfirst (Institute of Customer Service)

Websites

Council for Administration

www.cfa.co.uk

Institute of Customer Service

www.instituteofcustomerservice.com

Further information

For further information please call Customer Services on 0844 576 0026 (calls may be recorded for training purposes) or visit our website (www.edexcel.com).

Useful publications

Related information and publications include:

- *Guidance for Centres Offering Edexcel/BTEC QCF Accredited Programmes* (Edexcel, distributed to centres annually)
- Functional skills publications – specifications, tutor support materials and question papers
- *Regulatory arrangements for the Qualification and Credit Framework* (published by Ofqual) August 2008
- the current Edexcel publications catalogue and update catalogue.

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

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

How to obtain National Occupational Standards

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

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

Professional development and training

Edexcel supports UK and international customers with training related to BTEC qualifications. This support is available through a choice of training options offered in our published training directory or through customised training at your centre.

The support we offer focuses on a range of issues including:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing student-centred learning and teaching approaches
- building functional skills into your programme
- building in effective and efficient quality assurance systems.

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

Our customer service numbers are:

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

Calls may be recorded for training purposes.

The training we provide:

- is active – ideas are developed and applied
- is designed to be supportive and thought provoking
- builds on best practice.

Our training is underpinned by the LLUK standards for those preparing to teach and for those seeking evidence for their continuing professional development.

Annexe A

The Edexcel/BTEC qualification framework for the customer service sector

Progression opportunities within the framework.

Level	General qualifications	BTEC full vocationally-related qualifications	BTEC specialist courses	NVQ/occupational
4				Edexcel Level 4 NVQ Diploma in Customer Service (QCF) Edexcel Level 4 NVQ for Contact Centre Professionals
3			Edexcel BTEC Level 3 Award in Customer Service (QCF) Edexcel BTEC Level 3 Certificate in Customer Service (QCF) Edexcel BTEC Level 3 Award in Contact Centre Skills	Edexcel Level 3 NVQ Diploma in Customer Service (QCF) Edexcel Level 3 NVQ for Contact Centre Professionals Edexcel Level 3 NVQ in Telesales
2			Edexcel BTEC Level 2 Award in Customer Service (QCF) Edexcel BTEC Level 2 Certificate in Customer Service (QCF) Edexcel BTEC Level 2 Award in Contact Centre Skills	Edexcel Level 2 NVQ Certificate in Customer Service (QCF) Edexcel Level 2 NVQ in Contact Centre Operations Edexcel Level 2 NVQ in Telesales

Level	General qualifications	BTEC full vocationally-related qualifications	BTEC specialist courses	NVQ/occupational
1			Edexcel BTEC Level 1 Award in Customer Service	Edexcel Level 1 NVQ Certificate in Customer Service (QCF) Edexcel Level 1 NVQ in Contact Centre Operations

Annexe B

Wider curriculum mapping

Study of Edexcel BTEC Level 2 and 3 qualifications gives learners opportunities to develop an understanding of spiritual, moral, ethical, social and cultural issues as well as an awareness of citizenship, environmental issues, European developments, health and safety considerations and equal opportunities issues.

Spiritual, moral, ethical, social and cultural issues

Throughout the delivery of these qualifications learners will have the opportunity to actively participate in different kinds of decision making. They will have to consider fair and unfair situations and explore how to resolve conflict. Working in small groups they will learn how to respect and value others' beliefs, backgrounds and traditions.

Citizenship

Learners undertaking these qualifications will have the opportunity to develop their understanding of citizenship issues.

Environmental issues

Developing a responsible attitude towards the care of the environment is an integral part of these qualifications. Learners are encouraged to minimise waste and discuss controversial issues.

European developments

Much of the content of these qualifications applies throughout Europe, even though the delivery is in a UK context.

Health and safety considerations

Health and safety is embedded within many of the units in these qualifications. Learners will consider their own health and safety at work, how to identify risks and hazards and how to minimise those risks.

Equal opportunities issues

There will be opportunities throughout these qualifications to explore different kinds of rights and how these affect both individuals and communities, for example learners will consider their rights at work and the rights of employers and how these rights affect the work community.

Annexe C

National Occupational Standards/mapping with NOS

The grid below maps the knowledge covered in the Edexcel BTEC Level 2 and 3 Specialist qualifications in Customer Service against the underpinning knowledge of the Levels 1, 2, 3 and 4 National Occupational Standards in Customer Service.

KEY

- ✓ indicates full coverage of the NVQ unit
- # indicates partial coverage of the NVQ unit
- a blank space indicates no coverage of the underpinning knowledge

Units	Unit 1: Understanding good customer service	Unit 2: Delivering excellent customer service	Unit 3: Planning for self-development in customer service	Unit 4: Providing excellent customer service	Unit 5: Improving customer service
Unit F1: Communicate using customer service language	✓				
Unit F2: Follow the rules to deliver customer service	✓				
Unit F3: Demonstrate understanding of customer service				✓	
Unit F4: Demonstrate understanding of the rules that impact on improvements in customer service				✓	
Unit A1: Maintain a positive and customer-friendly attitude		#			
Unit A14: Use customer service as a competitive tool					#
Unit B2: Deliver reliable customer service		#			
Unit B11: Improve the customer relationship					#

Units	Unit 1: Understanding good customer service	Unit 2: Delivering excellent customer service	Unit 3: Planning for self-development in customer service	Unit 4: Providing excellent customer service	Unit 5: Improving customer service
Unit C1: Recognise and deal with customer queries, requests and problems		#			
Unit C7: Process customer service complaints					#
Unit D3: Develop personal performance through developing customer service			#		
Unit D6: Develop your own customer service skills through self-study			#		
Unit D10: Develop your own and others' customer service skills			#		

Annexe D

Mapping of Edexcel BTEC Level 2 Award and Certificate in Customer Service to Level 1 functional skills

Level 1	Unit number		
English – Speaking and Listening	1	2	3
Take full part in formal and informal discussions and exchanges that include unfamiliar subjects	✓	✓	✓
English – Reading			
Read and understand a range of straightforward texts	✓	✓	✓
English – Writing			
Write a range of texts to communicate information, ideas and opinions, using formats and styles suitable for their purpose and audience	✓	✓	✓

Level 1	Unit number		
Mathematics – representing	1	2	3
Understand practical problems in familiar and unfamiliar contexts and situations, some of which are non-routine			
Identify and obtain necessary information to tackle the problem			
Select mathematics in an organised way to find solutions			
Mathematics – analysing			
Apply mathematics in an organised way to find solutions to straightforward practical problems for different purposes			
Use appropriate checking procedures at each stage			

Level 1	Unit number		
Mathematics — interpreting	1	2	3
Interpret and communicate solutions to practical problems, drawing simple conclusions and giving explanations			

Mapping of Edexcel BTEC Level 3 Award and Certificate in Customer Service to Level 2 functional skills

Level 2	Unit number		
English – Speaking and Listening	3	4	5
Make a range of contributions to discussions in a range of contexts, including those that are unfamiliar, and make effective presentations	✓	✓	✓
English – Reading			
Select, read, understand and compare texts and use them to gather information, ideas, arguments and opinions	✓	✓	✓
English – Writing			
Write a range of texts, including extended written documents, communicating information, ideas and opinions, effectively and persuasively	✓	✓	✓

Level 2	Unit number		
Mathematics – learners can:	3	4	5
Understand routine and non-routine problems in familiar and unfamiliar contexts and situations			
Identify the situation or problems and identify the mathematical methods needed to solve them			
Select a range of mathematics to find solutions			
Mathematics – analysing			
Apply a range of mathematics to find solutions			
Use appropriate checking procedures and evaluate their effectiveness at each stage			

Level 2	Unit number		
Mathematics — interpreting			
Interpret and communicate solutions to multistage practical problems in familiar and unfamiliar contexts and situations			
Draw conclusions and provide mathematical justifications			

Annexe E

Unit mapping overview

BTEC Level 2 Award in Customer Service legacy (specification end date 31/07/2010)/new QCF versions of the BTEC Level 2 and 3 Specialist qualifications in Customer Service (specification start date 01/08/2010) – the BTEC Level 2 Award in Customer Service, BTEC Level 2 Certificate in Customer Service, BTEC Level 3 Award in Customer Service, BTEC Level 3 Certificate in Customer Service

Old units / New units	Level 2 BTEC Award Unit 1	Level 2 BTEC Award Unit 2	Level 2 BTEC Award Unit 3	Level 2 BTEC Certificate Unit 1	Level 2 BTEC Certificate Unit 2	Level 3 BTEC Award Unit 1	Level 3 BTEC Award Unit 2	Level 3 BTEC Award Unit 3	Level 3 BTEC Certificate Unit 1	Level 3 BTEC Certificate Unit 2
Unit 1	F			P	P	P	P	P	P	P
Unit 2		P	P	F			P			
Unit 3										
Unit 4						P	P	P	F	P
Unit 5						P				

KEY

P – Partial mapping (some topics from the old unit appear in the new unit)

F – Full mapping (topics in old unit match new unit exactly or almost exactly)

X – Full mapping + new (all the topics from the old unit appear in the new unit, but new unit also contains new topic(s))

Annexe F

Glossary of accreditation terminology

The following information about these qualifications can also be found on the Edexcel website.

Accreditation start/end date	The first/last dates that Edexcel can register learners for a qualification.
Certification end date	The last date on which a certificate may be issued by Edexcel.
Credit value	All units have a credit value. The minimum credit value that may be determined for a unit is one, and credits can only be awarded in whole numbers. Learners will be awarded credits for the successful completion of whole units.
Guided Learning Hours (GLH)	Guided learning hours are defined as all the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim being studied on a programme. This definition includes lectures, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes time spent by staff assessing learner achievement. It does not include time spent by staff in day-to-day marking of assignments or homework where the learner is not present.
Learning Aims Database	Link to the Learning Aims Database, which features detailed funding information by specific learning aim reference.
Learning Aim Reference	Unique reference number given to the qualification by the funding authorities on accreditation.
Level	The level at which the qualification is positioned in the Qualifications and Credit Framework (QCF).
Performance tables	These qualifications are listed on the Department for Education (DfE) website School and College Achievement and Attainment Tables (SCAAT) as performance indicators for schools and colleges.
Qualifications Accreditation Number (QAN)	Unique reference number given to the qualification by the regulatory authorities on accreditation.
Register of Regulated Qualifications	Link to the entry on the Register of Regulated Qualifications for a particular qualification. This database features detailed accreditation information for the particular qualification.
Section 96	Section 96 is a section of the Learning and Skills Act 2000. This shows for which age ranges the qualification is publicly funded for under-19 learners.

Section 97	Section 97 is a section of the Learning and Skills Act 2000. This shows whether the qualification is publicly funded for learners aged 19 and over.
Title	The accredited title of the qualification.
UCAS points	These qualifications are listed on the Universities and Colleges Admissions Service (UCAS) tariff for those wishing to progress to higher education.

Annexe G

BTEC Specialist and Professional qualifications

BTEC qualifications on the NQF	Level	BTEC Specialist and Professional Qualifications on the QCF	BTEC qualification suites on the QCF
BTEC Level 7 Advanced Professional Qualifications BTEC Advanced Professional Award, Certificate and Diploma	7	BTEC Level 7 Professional Qualifications BTEC Level 7 Award, Certificate, Extended Certificate and Diploma	
BTEC Level 6 Professional Qualifications BTEC Professional Award, Certificate and Diploma	6	BTEC Level 6 Professional Qualifications BTEC Level 6 Award, Certificate, Extended Certificate and Diploma	
BTEC Level 5 Professional Qualifications BTEC Professional Award, Certificate and Diploma	5	BTEC Level 5 Professional Qualifications BTEC Level 5 Award, Certificate, Extended Certificate and Diploma	BTEC Level 5 Higher Nationals BTEC Level 5 HND Diploma
BTEC Level 4 Professional Qualifications BTEC Professional Award, Certificate and Diploma	4	BTEC Level 4 Professional Qualifications BTEC Level 4 Award, Certificate, Extended Certificate and Diploma	BTEC Level 4 Higher Nationals BTEC Level 4 HNC Diploma
BTEC Level 3 Qualifications BTEC Award, Certificate, Extended Certificate and Diploma	3	BTEC Level 3 Specialist Qualifications BTEC Level 3 Award, Certificate, Extended Certificate and Diploma	BTEC Level 3 Nationals BTEC Level 3 Certificate, Subsidiary Diploma, Diploma and Extended Diploma

BTEC qualifications on the NQF	Level	BTEC Specialist and Professional Qualifications on the QCF	BTEC qualification suites on the QCF
BTEC Level 2 Qualifications BTEC Award, Certificate, Extended Certificate and Diploma	2	BTEC Level 2 Specialist Qualifications BTEC Level 2 Award, Certificate, Extended Certificate and Diploma	BTEC Level 2 Firsts BTEC Level 2 Certificate, Extended Certificate and Diploma
BTEC Level 1 Qualifications BTEC Award, Certificate, Extended Certificate and Diploma	1	BTEC Level 1 Specialist Qualifications BTEC Level 1 Award, Certificate, Extended Certificate and Diploma	BTEC Level 1 Qualifications BTEC Level 1 Award, Certificate and Diploma (vocational component of Foundation Learning)
	E	BTEC Entry Level Specialist Qualifications BTEC Entry Level Award, Certificate, Extended Certificate and Diploma	BTEC Entry Level Qualifications (E3) BTEC Entry Level 3 Award, Certificate and Diploma (vocational component of Foundation Learning)

NQF = National Qualifications Framework

QCF = Qualifications and Credit Framework

For most qualifications on the **NQF**, the accreditation end date is normally 31 August 2010 or 31 December 2010.

For qualifications on the **QCF**, the accreditation start date is usually 1 September 2010 or 1 January 2011.

QCF qualification sizes	
Award	1-12 credits
Certificate	13-36 credits
Diploma	37+ credits

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