Pearson
BTEC Level 3 Certificate in Principles of Customer Service (QCF)

Specification

Pearson BTEC Specialist qualification

First teaching August 2014

PEARSON

Pearson Education Limited is one of the UK's largest awarding organisations, offering academic and vocational qualifications and testing to schools, colleges, employers and other places of learning, both in the UK and internationally. Qualifications offered include GCSE, AS and A Level, NVQ and our BTEC suite of vocational qualifications, ranging from Entry Level to BTEC Higher National Diplomas. Pearson Education Limited administers BTEC qualifications.

Through initiatives such as onscreen marking and administration, Pearson is leading the way in using technology to modernise educational assessment, and to support teachers and learners.

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All information in this specification is correct at time of publication.

Contents

Purpose of this specification

The purpose of a specification as defined by Ofqual is to set out:

- the qualification's objective

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

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

- units that a learner must have completed before the qualification will be awarded and any optional routes

- any other requirements that a learner must have satisfied before they will be assessed or before the qualification will be awarded

- the knowledge, skills and understanding that will be assessed as part of the qualification (giving a clear indication of their coverage and depth)

- the method of any assessment and any associated requirements relating to it

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

- any specimen materials

- any specified levels of attainment.

1   Introducing Pearson BTEC Specialist qualifications

For more than 25 years, Pearson BTECs have earned their reputation as well-established, enduringly effective qualifications. They have a proven track record of improving motivation and achievement. Pearson BTECs also provide progression routes to the next stage of education or to employment.

What are Pearson BTEC Specialist qualifications?

Pearson BTEC Specialist qualifications are qualifications from Entry to Level 3 on the Qualifications and Credit Framework (QCF). They are work-related qualifications and are available in a range of sectors. They give learners the knowledge, understanding and skills they need to prepare for employment. They also provide career development opportunities for those already in work. These qualifications may be full-time or part-time courses in schools or colleges. Training centres and employers may also offer these qualifications.

Some Pearson BTEC Specialist qualifications are knowledge components in Apprenticeship Frameworks, i.e. Technical Certificates.

There are three sizes of Pearson BTEC Specialist 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 QCF has 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 every 10 hours of learning time
- learning time – defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes to the standard determined by the assessment criteria.

2 Qualification summary and key information

Qualification title	Pearson BTEC Level 3 Certificate in Principles of Customer Service (QCF)
QCF Qualification Number (QN)	600/9663/9
Qualification framework	Qualifications and Credit Framework (QCF)
Regulation start date	11/06/2013
Operational start date	01/08/2014
Approved age ranges	16-18
	19+
Credit value	13
Assessment	Pearson-devised assessment (onscreen multiple-choice testing and workbook)
Guided learning hours	105
Grading information	The qualification and units are at pass grade.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must follow the Pearson Access and Recruitment policy (see *Section 10 Access and recruitment*)

QCF qualification number and qualification title

Centres will need to use the QCF Qualification Number (QN) when they seek public funding for their learners. As well as a QN, each unit within a qualification has a QCF unit reference number (URN).

The qualification title, unit titles and QN will appear on each learner's final certificate. You should tell your learners this when your centre recruits them and registers them with us. There is more information about certification in the *Edexcel Information Manual,* available on our website: www.edexcel.com

Objective of the qualification

The Pearson BTEC Level 3 Certificate in Principles of Customer Service (QCF) is for learners who work in, or want to work in, a customer service role.

It gives learners the opportunity to:

- develop knowledge related to a customer service role
- learn about interpersonal skills required to work in a customer focused role…
- achieve a nationally-recognised Level 3 qualification
- develop their own personal growth and engagement in learning.

Apprenticeships

Skills CFA approve the Pearson BTEC Level 3 Certificate in Principles of Customer Service (QCF) as a knowledge component for the Advanced Apprenticeship in Customer Service (England)

Relationship with previous qualifications

This qualification is a replacement for the Pearson EDI Level 3 Certificate in Principles of Customer Service (QCF).

Progression opportunities

Learners who have achieved the Pearson BTEC Level 3 Certificate in Principles of Customer Service (QCF) can progress to Level 4 qualification in a related area of study, such as a BTEC Level 4 qualification in Business and Administration (QCF) or the competence based Level 4 NVQ qualification in Customer Service.

Industry support and recognition

This qualification is supported by Skills CFA, the Sector Skills Council for business skills.

Relationship with National Occupational Standards

This qualification relates to the National Occupational Standards in Customer Service. The mapping document in *Annexe A* shows the links between the units within this qualification and the National Occupational Standards.

3   Qualification structure

Pearson BTEC Level 3 Certificate in Principles of Customer Service (QCF)

The learner will need to meet the requirements outlined in the table below before Pearson can award the qualification.

Minimum number of credits that must be achieved	13

Unit	Unit reference number	Mandatory units	Level	Credit	Guided learning hours
1	L/600/0659	Principles of customer service delivery	3	6	50
2	F/600/0660	Developing and improving the customer service process	3	7	55

4 Assessment

The table below gives a summary of the assessment methods used in the qualification.

Units	Assessment method
Unit 1 — L/600/0659	Pearson-devised assessment: onscreen test (external assessment)
Unit 2 — F/600/0660	Pearson-devised assessment: workbook (internal assessment)

Unit 1 — Pearson-devised assessment (external assessment)

To pass an externally assessed unit, learners must pass an onscreen multiple-choice test. Pearson sets and marks the multiple-choice test. The test writer will use the *Unit amplification* section as a guide when writing questions for the external assessments.

Further information, including details of test duration and question types is available on the webpage for this qualification

Unit 2 — Pearson-devised assessment (internal assessment)

The internal assessment workbook is set by Pearson, and is internally assessed and verified by the centre, against the assessment criteria of the unit.

5 Recognising prior learning and achievement

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.

Pearson encourages centres to recognise learners' previous achievements and experiences in and outside the workplace, 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. If 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.

Further guidance is available in the policy document *Recognition of Prior Learning Policy and Process*, which is on our website, www.edexcel.com.

Credit transfer

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

If learners achieve credits with other awarding organisations, they do not need to retake any assessment for the same units. The centre must keep evidence of credit achievement.

6 Centre resource requirements

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

- Centres must have appropriate physical resources (for example, equipment, IT, learning materials, teaching rooms) to support the delivery and assessment of the qualification.

- Staff involved in the assessment process must have relevant expertise and occupational experience.

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

- Centres must have appropriate health and safety policies in place relating to the use of equipment by learners.

- Centres must deliver the qualifications in accordance with current equality legislation. For further details on Pearson's commitment to the Equality Act 2010, please see *Section 10 Access and recruitment* and *Section 11 Access to qualifications for learners with disabilities or specific needs*. For full details on the Equality Act 2010, please go to the Home Office website, www.gov.uk/government/organisations/home-office

7 Centre recognition and approval centre recognition

Centres that have not previously offered Pearson qualifications need to apply for, and be granted, centre recognition as part of the process for approval to offer individual qualifications.

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

Guidance on seeking approval to deliver Pearson BTEC qualifications is available at www.edexcel.com.

Approvals agreement

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

8   Quality assurance of centres

Quality assurance is at the heart of vocational qualifications. The centre assesses Pearson BTEC qualifications. The centre will use quality assurance to make sure that their managers, internal verifiers and assessors are standardised and supported. Pearson use quality assurance to check that all centres are working to national standards. It gives us the opportunity to identify and provide support, if needed, to safeguard certification. It also allows us to recognise and support good practice.

For the qualifications in this specification, the Pearson quality assurance model will follow one of the processes listed below.

1   Delivery of the qualification as part of a BTEC apprenticeship ('single click' registration):

   - an annual visit by a Standards Verifier to review centre-wide quality assurance systems and sampling of internal verification and assessor decisions

2   Delivery of the qualification outside the apprenticeship:

   - an annual visit to the centre by a Centre Quality Reviewer to review centre-wide quality assurance systems

   - Lead Internal Verifier accreditation. This involves online training and standardisation of Lead Internal Verifiers using our OSCA platform, accessed via Edexcel Online. Please note that not all qualifications will include Lead Internal Verifier accreditation. Where this is the case, we will annually allocate annually a Standards Verifier to conduct postal sampling of internal verification and assessor decisions for the Principal Subject Area.

For further details, go to the *UK BTEC Quality Assurance Handbook* on our website.

9 Programme delivery

Centres are free to offer the qualifications using any mode of delivery (for example full-time, part-time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must make sure that learners have access to the resources identified in the specification and to the subject specialists delivering the units.

Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to make sure a course is relevant to learners' specific needs

- accessing and using non-confidential data and documents from learners' workplaces

- developing up-to-date and relevant teaching materials that make use of scenarios that are relevant to the sector

- giving learners the opportunity to apply their learning in practical activities

- including sponsoring employers in the delivery of the programme and, where appropriate, in the assessment

- making full use of the variety of experience of work and life that learners bring to the programme.

Where a unit is externally assessed, it is essential that learners have covered all of the *Unit amplification* before they are tested.

Centres must make sure that any legislation taught is up to date.

10 Access and recruitment

Pearson's policy regarding access to our qualifications is that:

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

Centres are required to recruit learners to Pearson BTEC Specialist qualifications with integrity.

Applicants will need relevant information and advice about the qualification to make sure it meets their needs.

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

For learners with disabilities and specific needs, this review will need to take account of the support available to the learner during teaching and assessment of the qualification. The review must take account of the information and guidance in *Section 11 Access to qualifications for learners with disabilities or specific needs*.

Learners may be aged between 14 and 16 and therefore potentially vulnerable. Where learners are required to spend time and be assessed in work settings, it is the centre's responsibility to ensure that the work environment they go into is safe.

11 Access to qualifications for learners with disabilities or specific needs

Equality and fairness are central to our work. Pearson's Equality Policy requires all learners to have equal opportunity to access our qualifications and assessments. It also requires our qualifications to be awarded in a way that is fair to every learner.

We are committed to making sure that:

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

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

Learners taking a qualification may be assessed in British sign language or Irish sign language where it is permitted for the purpose of reasonable adjustments.

Further information regarding Access Arrangements can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational qualifications*. Further details on how to make adjustments for learners with protected characteristics are given in the *Supplementary Guidance for Reasonable Adjustment and Special Consideration in Vocational Internally Assessed Units*.

These documents are available on our website, at www.edexcel.com/Policies

12 Units

Units have the following sections.

Unit title

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

Unit reference number

Each unit is assigned a unit reference number that appears with the unit title on the Register of Regulated Qualifications.

QCF level

All units and qualifications within the QCF have a level assigned to them. There are nine levels of achievement, from Entry to Level 8. The QCF Level Descriptors inform the allocation of the level.

Credit value

When a learner achieves a unit, they gain the specified number of credits.

Guided learning hours

Guided learning hours are the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim for a programme. This definition covers lectures, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes assessment by staff where learners are present. It does not include time spent by staff marking assignments or homework where the learner is not present.

Unit aim

This gives a summary of what the unit aims to do.

Essential resources

This section lists any specialist resources needed to deliver the unit. The centre will be asked to make sure that these resources are in place when it seeks approval from Pearson to offer the qualification.

Learning outcomes

The learning outcomes of a unit set out what a learner knows, understands or is able to do as the result of a process of learning.

Assessment criteria

Assessment criteria specify the standard required by the learner to achieve each learning outcome.

Unit amplification

This section clarifies what a learner needs to know to achieve a learning outcome.

Information for tutors

This section gives tutors information on delivery and assessment. It contains the following subsections.

- *Delivery* – explains the content's relationship to the learning outcomes and offers guidance on possible approaches to delivery.

- *Assessment* – gives information about the evidence that learners must produce, together with any additional guidance if appropriate. This section should be read in conjunction with the assessment criteria.

- *Indicative resource materials* – lists resource materials that can be used to support the teaching of the unit, for example books, journals and websites.

Unit 1: Principles of customer service delivery

Unit reference number: L/600/0659

QCF level: 3

Credit value: 6

Guided learning hours: 50

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Unit aim

This unit is aimed at enabling the learner to understand how customer service delivery and legislation affects customer expectation. The learner will develop knowledge of the principles of customer service, how behaviour, communication and interpersonal skills will impact upon customer expectation and satisfaction. The learner will learn the techniques for dealing with customer service problems and complaints and how legislation affects the customer service process.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria		Unit amplification
1	Describe the principles which impact on customer expectations	1.1	Identify the differences in working in a customer service role within different sectors	Working in a customer service role within different sectors has similarities and differences: □ Public sector goods and services are provided by the government (hospital, school, welfare); profit is not the goal; lacks competition; □ Private sector business operates in a dynamic competitive market (retail, manufacturing, Service); motivated by profit; focused on building customer loyalty and attracting new customers; service deliverer can be a USP and the competitive advantage for the business □ Voluntary/not-for profit business (charities) operate within a competitive area; aim to make money but not profit motivated;
		1.2	Explain what is meant by customer expectations and how these are formed	Customer expectation is what the customer expects to receive from an organisation in respect of their product or service. How customer expectations are formed: □ through what they hear, see and read; brand message, mission statement, reputation; company website, comparison websites; word of mouth from family and friends; articles, advertising; style of premises (inviting); price quality relationship (high price, high quality) □ through past experience; how they were treated and comparison against treatment from competitor (friendly, welcoming, professional, interested); style of premises (modern, old, cluttered, dark)

Learning outcomes	Assessment criteria		Unit amplification
	1.3	Describe how to balance the needs and expectations of the customer with those of the organisation	How to balance the needs and expectations of the customer with those of the organisation:
			☐ Customer charter setting the standards for the organisation regarding its customer service
			☐ Negotiate conflicting expectations (timescales, logistics, financial, legal)
			☐ Develop the service deliverer's skills (interpersonal, influencing, communicating, persuading) to reach mutual satisfaction

Learning outcomes		Assessment criteria		Unit amplification
2	Identify how behaviour, communication and interpersonal skills affect customer expectations and satisfaction	2.1	Describe how the individual's and the customer's behaviours affect expectations	How the service deliverer and the customer's behaviour affect expectations: ☐ Action of one behaviour (aggressive, confused, emotional, frustrated, worried, special or cultural needs) causes a reaction in the other that informs their expectation ☐ Positive polite professional behaviour of the individual leads to high expectations, trust and confidence for the customer ☐ Negative disinterested behaviour of individual leads to low expectations distrust and anger from the customer
		2.2	Identify and use different methods of communication to meet a range of customer expectations	Different methods of communication to meet customer expectations: ☐ Confidential information; face to face, telephone, letter ☐ Sensitive information; face to face, telephone ☐ Important information; telephone, letter, email, text ☐ General information; letter, email, text, leaflet, internet, intranet, social media, online-communities.

Learning outcomes	Assessment criteria		Unit amplification
	2.3	Identify different types of non verbal communication and their impact	Different types of non-verbal communication and its impact:
			☐ Facial expression; smiling and welcoming; frowning and unwelcoming
			☐ Gestures; waving (attracts attention and inviting); pointing (accusing, angry, aggressive)
			☐ Paralinguistic (tone of voice, loudness, inflection, pitch); strong tone (inspires attention, approval, enthusiasm); hesitant tone (disapproval, lack of interest, distrust)
			☐ Body language and posture; relaxed posture, open body language (inspires confidence and trust); arms crossed closed body language (defensive)
			☐ Proxemics (personal space); respect personal space (relaxes, put at ease); enter personal space (aggression, intimidation)
			☐ Written; provides detailed information; convoluted, badly written
	2.4	Explain the interpersonal skills which can be used to achieve customer satisfaction	Using interpersonal skills to achieve customer satisfaction
			☐ Verbal Communication; questions and answers to understand customer needs in order to achieve customer satisfaction
			☐ Non-Verbal Communication; open body language to gain customer trust
			☐ Listening Skills; to interpret both the verbal and non-verbal messages and measure level of satisfaction
			☐ Problem solving; working with customer to identify, define and solve their problem
			☐ Decision making and negotiating; exploring and analysing options that achieve mutual satisfaction

Learning outcomes	Assessment criteria		Unit amplification
	2.5	Identify possible barriers to effective communication	Barriers to effective communication:
			☐ Physical; hearing impairment, sight problems, unable to concentrate, tired
			☐ Language; English not first language, accents, use of local words or phrases, jargon, ambiguity, breakdown acronyms and abbreviations
			☐ Other; poor listening skills, lack of communication, lack of discussion, misunderstanding, technology breakdown, environmental constraints.

Learning outcomes		Assessment criteria		Unit amplification
3	Describe solutions to customer service problems and complaints within organisational constraints	3.1	Describe techniques for dealing with customer service problems or complaints	Techniques to improve customer service problems or complaints: ☐ Record and monitor complaints; learn from customer experience to improve the service ☐ Actively listen; establish facts, agree follow-up action, respect customers' viewpoint, questioning for clarification, summarise complaint to check understanding ☐ Empathise; gain customer confidence and trust, turn from complaint to query ☐ Keep customer informed/updates as to status of query/complaint ☐ Know limits of authority; analyse problem and negotiate or escalate
		3.2	Describe the factors that need to be considered when finding a solution to a customer service problem	Factors that need to be considered when finding solutions to a customer service problem: ☐ Compliant with legislation; Sale of Goods Act, Supply of Goods or Services Act, Data Protection Act ☐ Cost to the organisation; cheaper to supply new or repair problem, resource availability ☐ Time restraints; warranty, guarantees, KPI's ☐ Organisational requirements; limits of own authority, escalation ☐ Empathy not sympathy; avoid emotional reaction to customers problem ☐ Show appropriate behaviour towards customer needs; listen and take ownership of their query

Learning outcomes	Assessment criteria		Unit amplification
	3.3	Identify solutions to customer problems and complaints	Solutions to customer problems and complaints:
			☐ Offer an alternative
			☐ Offer a replacement
			☐ Offer a refund
			☐ Offer compensation
			☐ Negotiate within personal authority limitations
	3.4	Explain why a complaint should be viewed in a positive manner	Why a complaint should be viewed positively:
			☐ Provides formal feedback of the products or service
			☐ Resolving a complaint swiftly can result in customer loyalty
			☐ Highlights weaknesses in organisation systems or procedures, giving the organisation an opportunity to improve

Learning outcomes	Assessment criteria		Unit amplification
	3.5	Describe how the use of record keeping systems help manage and support the customer service process	Keeping record systems, records customer purchasing history, provides a profile of potential future spending, where to target new products and improve the customer service.

Recordable data:

☐ Personal data; customer's name, address, account details, previous purchases

☐ Customer feedback on a product or service; user evaluation, warranty/guarantee records

☐ Purchasing history; most commonly purchased product

☐ Record of complaints

Recorded data manages and supports the customer service process by:

☐ Stock turnover; informs on quantity required for products to be held in stock and avoid disappointing customers

☐ Customer profile; (geographical location, age, gender) to personalise the customer service

☐ Target sales opportunities; inform customer when similar products or new versions are available

☐ Target loyalty schemes; offer personalised discount, offers, vouchers |

Learning outcomes		Assessment criteria		Unit amplification
4	Explain how legislation affects the customer service process	4.1	Identify and explain how relevant legislation affects the customer service process	Legislation protects the consumer when buying goods or services, organisations have a legal obligation to incorporate the relevant legislation into their customer service policies and processes, and inform the consumer of their statutory rights:
				☐ Sale of Goods Act; goods must be as described, fit for purpose, satisfactory quality, if not, purchaser can request, refund, repair or replacement. Regulations within Sale of Goods Act
				• The Consumer Protection (Distance Selling) regulations
				• The Unfair Terms in Consumer Contracts regulations
				• The Sale and Supply of Goods to Consumers regulations
				☐ Supply of Goods and Services Act; service provided by tradesmen and professionals must be carried out with reasonable care and skill, within a reasonable time and charge; must be described, of satisfactory quality, fit for purpose; breach of contract can lead to consumer claiming compensation, repair or replacement
				☐ Unsolicited Goods and Services Act; protects the customer from goods or services not ordered by them
				☐ Trade Descriptions Act; prohibits the false description (verbally, in writing, advertisement, packaging/labelling, implication) of goods given, supplied or offered for supply by an organisation or individual
				☐ Consumer Protection Act; safeguards the customer from products that do not reach a reasonable level of safety, compensation can be claimed where a product is proven to cause harm or injury

Learning outcomes	Assessment criteria		Unit amplification
			□ Data Protection Act; maintains the security and confidentiality of customer details and lays down principles for handling personal information
			□ Health and Safety at Work Act; safety of the customer environment
			Equality Act; legally protects people from discrimination in the workplace and in wider society
	4.2	Identify and explain the relevant legislation relating to customer record keeping and its implications	The Data Protection Act regulates the collection, storing and sharing of information (paper, electronic) of customers.

The Act has 8 principles that cover the storage and use of data:

1 Processed fairly and lawfully

2 Obtained for specified and lawful purposes

3 Adequate, relevant and not excessive

4 Accurate and up to date

5 Not kept any longer than necessary

6 Processed in accordance with the 'data subject's' (the individual's) rights*

7 Securely kept

8 Not transferred to any other country without adequate protection in place. |

Learning outcomes	Assessment criteria		Unit amplification
			*These are:
			• access to personal information
			• prevent processing likely to cause damage or distress
			• prevent processing for direct marketing
			• automated decision making
			• compensation
			• rectification, blocking, erasure & destruction
			• jurisdiction and procedure
			• appropriate measures shall be taken against unauthorised or unlawful processing of personal data
			• and against accidental loss, destruction or damage to the data
			Organisations need to be aware that appropriate measures can be taken when there is unauthorised or unlawful processing of personal data, in the form of a penalty from the UK Information Commissioner's Office, as well as possible loss of business and brand damage
	4.3	Explain the importance of maintaining security and confidentiality of data	Maintaining security and confidentiality of data is important due to:
			☐ Legal requirement (Data Protection); it's a criminal offence where breached
			☐ An organisations ethical responsibility to securely maintain information to safeguard customers and secure from competitors
			☐ Customer may feel betrayed and move to a competitor if they feel their security has been breached
			☐ can become a USP or competitive advantage for the organisation

Learning outcomes	Assessment criteria	Unit amplification
	4.4 Define different forms of contracts and describe what makes a contract binding	A contract requires three factors to be binding: □ an offer □ an acceptance □ consideration Forms of contract: □ Express contract; parties state and agree the terms at the time of its formation (terms of agreement, credit facilities, price and discount) □ Implied contract; an obligation arising from a mutual agreement and intent to promise, which have not been expressed in words □ Executory contract; where some future act or obligation remains to be performed according to its terms □ Bilateral contract; the exchange of promises between entities that entails their performance of an act □ Unilateral contract; the offeror makes a promise of payment or other consideration, the offeree performs the act
	4.5 Explain the purpose of codes of practice and describe their relationship to customer service	A Code of Practice: written guidelines issued by an official body or a professional association to its member organisations on how to comply with its standards; offers guidance to its customers on standards to expect from its member organisation; how to make a complaint. The code of practice focuses on the relationship between its member organisation and the customer, on matters of: □ how the member organisation should conduct their business □ how to handle customer complaints □ guide to customers on how to make a complaint □ ethical best practice and behaviour

Information for tutors

Delivery

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

Learners should be encouraged to engage with customers, employers and where possible, other employees, to further enhance their knowledge and understanding of customer service delivery.

Perspectives on the delivery of customer service, gained through engaging with customers, employers and employees, rather than through a purely theoretical context, is 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 visual based 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 is assessed through an onscreen test. Edexcel will set and mark this test. The test uses the individual assessment criteria and the associated *Unit amplification*.

Suggested resource

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 2: Developing and improving the customer service process

Unit reference number: F/600/0660

QCF level: 3

Credit value: 7

Guided learning hours: 5

Unit aim

To enable the learner to understand how the customer service process can be developed and improved through customer feedback, promotion of products and services and effective teamwork.

Unit assessment requirements/evidence requirements

The internal assessment task for this unit is set and moderated by Pearson, and marked by the centre, against the assessment criteria in the unit.

The task set by Pearson is available to registered centres through the Pearson website and consists of a workbook, which learners are able to contextualise to their own experiences. Where this qualification is taken as part of an apprenticeship the assessment task can additionally be used as evidence towards the competence-based element.

For the purposes of this qualification the learner's place of work, work placement or an organisation that they are familiar with are all-permissible as the context. Where the evidence is used as part of the competence-based element of apprenticeship, the context must be a realistic working environment.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner 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.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Explain how customer feedback can improve the customer service process	1.1	Describe the benefits of evaluating the customer service experience			
		1.2	Describe and compare a range of techniques used in monitoring customer service delivery			
		1.3	Design a method of obtaining customer feedback			
		1.4	Explain how the outcome of an organisational SWOT analysis can be used to promote a cycle of continuous improvement			
		1.5	Explain the techniques used to monitor and review the impact of any changes introduced in an organisation to customers, employees and the organisation			
2	Describe the process of promoting products and services	2.1	Explain how Unique Selling Points (USP) can influence the customer choice of products and services			
		2.2	Define what a Unique Service Offer (USO) is and how it is used to differentiate service offers from that of competitors			
		2.3	Explain how organisations promote their products and services			
		2.4	Describe how cost benefit analysis would influence the method used to promote a product or service			
		2.5	Describe the importance of evaluating promotions			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
3 Explain the importance of effective teamwork and the monitoring of performance	3.1	Identify different communication techniques used when managing a team			
	3.2	Describe the inter-personal skills required for effective team working			
	3.3	Explain the importance of effective service partnerships for the delivery of excellent customer service			
	3.4	Explain the dynamics of team working			
	3.5	Explain why it is import to agree set goals with team members			
	3.6	Explain the methods used by organisations to set levels of customer service performance			
	3.7	Identify methods for monitoring the performance of individual and teams			
	3.8	Explain how team members can self -assess and develop their customer service skills and knowledge			
	3.9	Complete a personal development plan			

13 Further information and useful publications

To get in touch with us visit our 'Contact us' pages:

- Pearson Edexcel: **www.edexcel.com/contactus**

- Pearson BTEC: **www.btec.co.uk/contactus**

- Pearson Work Based Learning: **www.pearsonwbl.com/contactus**

- Books, software and online resources for UK schools and colleges: **www.pearsonschools.co.uk/contactus**

Other sources of information and publications available include:

- *Pearson Equality Policy*

- *Edexcel Information Manual* (updated annually)

- *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational qualifications*

- *Supplementary Guidance for Reasonable Adjustment and Special Consideration in Vocational Internally Assessed Units*

- *Recognition of Prior Learning Policy and Process*

- *Quality Assurance Handbook* (updated annually)

- *BTEC Centre Guide to Assessment*

Publications on the quality assurance of Pearson BTEC qualifications are available on our website at www.edexcel.com/quals/BTEC/quality/Pages/documents.aspx

Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please go to www.edexcel.com/resources/Pages/home.aspx

Additional resources

If you need further learning and teaching materials to support planning and delivery for your learners, there is a wide range of BTEC resources available.

Any publisher can seek endorsement for their resources, and, if they are successful, we will list their BTEC resources on our website at: www.edexcel.com/resources

14 Professional development and training

Pearson supports UK and international customers with training related to Pearson 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 learner-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 is on our website at: www.edexcel.com/training. You can request customised training through the website or you can contact one of our advisors in the Training from Edexcel team via Customer Services to discuss your training needs.

BTEC training and support for the lifetime of the qualifications

Training and networks: our training programme ranges from free introductory events through sector-specific opportunities to detailed training on all aspects of delivery, assignments and assessment. We have designed our new network events programme to allow you to share your experiences, ideas and best practice with other BTEC colleagues in your region. Sign up to the training you need at: www.btec.co.uk/training

Regional support: our team of Curriculum Development Managers and Curriculum Support Consultants, based around the country, are responsible for providing advice and support in centres. They can help you with planning and curriculum developments. If you would like your Curriculum Development Manager to contact you, please get in touch with your regional office on: 0844 463 2535.

Your Pearson BTEC support team

Whether you want to talk to a sector specialist, browse online or submit your query for an individual response, there's someone in our Pearson BTEC support team to help you whenever – and however – you need:

- Subject Advisors: find out more about our subject advisor team – immediate, reliable support from a fellow subject expert – at: www.edexcel.com/subjectadvisors

- Ask Edexcel: submit your question online to our Ask Edexcel online service www.edexcel.com/ask and we will make sure your query is handled by a subject specialist.

Annexe A

Mapping with National Occupational Standards

The grid below maps the knowledge covered in the Pearson BTEC Level 3 Specialist qualifications in Principles of Customer Service against the underpinning knowledge of the National Occupational Standards in Customer Service. Centres can use this mapping when planning holistic delivery and assessment activities.

KEY

\# indicates partial coverage of knowledge in the NOS unit

A blank space indicates no coverage of the knowledge

NOS	Pearson BTEC Specialist units	Unit 1	Unit 2
CFACSA3	Communicate effectively with customers	#	#
CFACSA2	Adapt your behaviour to give a good customer service impression	#	#
CFACSA7	Live up to the customer service promise	#	#
CFACSA9	Go the extra mile in customer service	#	
CFACSA10	Deal with customers face to face	#	
CFACSA11	Deal with incoming telephone calls from customers	#	
CFACSB2	Deliver reliable customer service	#	#
CFACSB4	Recognise diversity when delivering customer service	#	#
CFACSB6	Use questioning techniques when delivering customer service	#	
CFACSC1	Recognise and deal with customer queries, requests and problems	#	

NOS	Pearson BTEC Specialist units	Unit 1	Unit 2
CFACSC2	Take details of customer service problems	#	#
CFACSC3	Resolve customer service problems	#	#
CFACSC6	Apply risk assessment to customer service	#	
CFACSF1	Communicate using customer service language	#	#
CFACSF2	Follow the rules to deliver customer service	#	#
CFACSF5	Demonstrate understanding of customer service management	#	
CFACSF6	Follow organisational rules, legislation and external regulations when managing customer service	#	
CFACSB13	Plan, organise and control customer service operations	#	
CFACSA5	Promote additional services or products to customers		#
CFACSA15	Organise the promotion of additional services or products to customers		#
CFACSB16	Deliver seamless customer service with a team		#
CFACSD8	Work with others to improve customer service		#
CFACSD10	Develop your own and others' customer service skills		#
CFACSD11	Lead a team to improve customer service		#
CFACSD12	Gather, analyse and interpret customer feedback		#