

# **SVQ 2 in Customer Service at SCQF Level 5**

## **Scottish Vocational Qualifications**

Specification

First registration January 2016

Issue 2

## **Edexcel, BTEC and LCCI qualifications**

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ISBN 978 1 446 92639 0

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## Purpose of this specification

This specification sets out:

- the type of qualification
- the objectives of the qualification
- any other qualifications that a candidate must have completed before taking the qualification
- any prior knowledge, skills or understanding which the candidate is required to have before taking the qualification
- the combination of units that a candidate must have completed before the qualification will be awarded and any pathways
- methods of assessment
- conditions of assessment including: the knowledge, skills and understanding that will be assessed as part of the qualification
- the criteria against which a candidate's level of attainment will be measured (such as assessment criteria)
- resources required, including roles, responsibilities and requirements, technical and physical
- evidence requirements
- assessment principles or requirements for the qualification, for example assessment strategies, assessment principles/requirements or any other appropriate guidelines
- assessment requirements/strategy as published by the relevant Sector Skills Council/Standards Setting Body
- the Modern Apprenticeship Framework in which the qualification is included, where appropriate.

# 1 Introducing Edexcel Scottish Vocational Qualifications

## What are Scottish Vocational Qualifications?

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

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

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

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

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

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



## 2 Explanation of levels

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

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

### 3 Qualification summary and key information

Qualification title	SVQ 2 in Customer Service at SCQF Level 5
Operational start date	01/01/2016
Minimum age	16  Please note that sector-specific requirements or regulations may prevent candidates of a particular age from embarking on this qualification. Please refer to the assessment requirements/strategy.
Number of required units	7
Credit points	Minimum 29; Maximum 44
Assessment	Portfolio of evidence (internal assessment).
Grading information	The qualification and units are graded pass/fail.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before candidates register for this qualification. However, centres must also follow the <i>Pearson Access and Recruitment Policy</i> (see <i>Section 8, Access and Recruitment</i> ).
Funding	Details of funding approval are available from Skills Development Scotland at: <a href="http://www.skillsdevelopmentscotland.co.uk">www.skillsdevelopmentscotland.co.uk</a> and the Scottish Funding Council at: <a href="http://www.sfc.ac.uk">www.sfc.ac.uk</a>  Information is also available on the Scottish Qualifications Authority (SQA) website: <a href="http://www.sqa.org.uk">www.sqa.org.uk</a>

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

## 4 Qualification rationale

### Qualification objectives

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The SVQ 2 in Customer Service at SCQF Level 5 is for candidates who work in, or who want to work in, customer service roles such as:

- Customer Service Adviser
- Customer Service Operator
- Call Centre Adviser
- Helpdesk Operative
- Service Agent.

The qualification gives candidates the opportunity to:

- develop and demonstrate competence in the job roles stated above. Technical knowledge includes the principles and practices of delivering customer service and understanding the different types of customers, their needs, wants and expectations. Wider sector-related knowledge includes equality and diversity, organisational structure and environment, and legislation and regulations that govern the industry
- develop and demonstrate a range of technical skills and behaviours that support competence in the job roles stated above. This includes communicating with customers using appropriate communication channels, resolving customer problems and complaints, building relationships with customers, promoting additional products and/or services and the ability to improve own learning and performance
- have existing skills and knowledge recognised
- achieve a nationally recognised SCQF Level 5 qualification
- develop personal growth and engagement in learning.

### Relationship with previous qualifications

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This qualification is a direct replacement for the SVQ 2 in Customer Service at SCQF Level 5, which has been updated to include the 2013 National Occupational Standards.

### Apprenticeships

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Skills CFA include the SVQ 2 in Customer Service at SCQF Level 5 as the mandatory component for the Modern Apprenticeship in Customer Service.

## **Progression opportunities**

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Candidates who achieve the SVQ 2 in Customer Service at SCQF Level 5 can progress to the SVQ 3 in Customer Service at SCQF Level 6, which is the competencies component of the Level 3 Modern Apprenticeship in Customer Service.

Achieving this qualification also gives candidates the opportunity to progress to job roles with additional responsibilities such as Customer Relationship Manager, Customer Support Officer, Customer Service Team Leader and Customer Service Supervisor.

## **Industry support and recognition**

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

## **Relationship with National Occupational Standards**

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

## 5 Qualification structure

### SVQ 2 in Customer Service at SCQF Level 5

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

Minimum number of units that must be completed	7
Number of mandatory units that must be completed	2
Number of optional units that must be achieved One optional unit must be selected from each of Groups B, C, D and E. A further unit can be selected from any of Groups, B, C, D and E.	5

Unit	SQA unit code	Mandatory units	Credit points	SCQF Level
1	CFACSF1	Communicate in a Customer Service Environment	4	4
2	CFACSF2	Deliver Customer Service within the Rules	4	5
Unit	SQA unit code	Optional units – Group B Impression and image	Credit points	SCQF Level
3	CFACSA3	Communicate Effectively with Customers	5	5
4	CFACSA4	Give Customers a Positive Impression of Yourself and Your Organisation	5	5
5	CFACSA5	Promote Additional Services or Products to Customers	6	5
6	CFACSA6	Process Information about Customers	5	5
7	CFACSA7	Live up to the Brand Promise when Delivering Customer Service	6	5
8	CFACSA8	Make Customer Service Personal	6	5
9	CFACSA9	Go the Extra Mile in Customer Service	6	5
10	CFACSA10	Deal with Customers Face to Face	5	5
11	CFACSA11	Deal with Incoming Telephone Calls from Customers	5	5
12	CFACSA12	Make Telephone Calls to Customers	6	5
13	CFACSA19	Deal with Customers Using a Social Media Platform	3	5

Unit	SQA unit code	Optional units – Group C Delivery	Credit points	SCQF Level
14	CFACSB2	Deliver Reliable Customer Service	5	5
15	CFACSB3	Deliver Customer Service on your Customer's Premises	5	5
16	CFACSB4	Recognise Diversity when Delivering Customer Service	5	5
17	CFACSB5	Deal with Customers across a Language Divide	8	5
18	CFACSB6	Use Questioning Techniques when Delivering Customer Service	4	5
19	CFACSB7	Deal with Customers Using Bespoke Software	5	5
20	CFACSB8	Maintain Customer Service through Effective Handover	4	5
21	CFACSB17	Deliver Customer Service in an Environmentally Friendly and Sustainable way	3	5
Unit	SQA unit code	Optional units – Group D Handling problems	Credit points	SCQF Level
22	CFACSC3	Resolve Customer Service Problems	6	5
23	CFACSC4	Deliver Customer Service to Challenging Customers	6	5
24	CFACSC5	Monitor and Solve Customer Service Problems	6	6
25	CFACSC6	Apply Risk Assessment to Customer Service	10	7
26	CFACSC7	Process Customer Service Complaints	6	7
Unit	SQA unit code	Optional units – Group E Development and improvement	Credit points	SCQF Level
27	CFACSD1	Develop Customer Relationships	6	5
28	CFACSD2	Support Customer Service Improvements	5	5
29	CFACSD3	Develop Personal Performance through Delivering Customer Service	6	5
30	CFACSD4	Support Customers Using Online Customer Services	5	5

Unit	SQA unit code	Optional units – Group E Development and improvement	Credit points	SCQF Level
31	CFACSD5	Buddy a Colleague to Develop their Customer Service Skills	5	5
32	CFACSD6	Develop Your Own Customer Service Skills through Individual Learning	6	5
33	CFACSD7	Support Customers Using Self-service Technology	5	5

Centres should be aware that within the SCQF Level 5 qualification in this specification, candidates may be required to meet the demands of units at SCQF Levels 6 or 7. Centres are advised to consider the support, guidance and opportunities they give to candidates to meet the demands of the higher-level units.

## 6 Programme delivery

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

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

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

### Elements of good practice

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#### Candidate recruitment, preparation and support

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

- providing initial advice and guidance, including work tasters, to potential candidates to give them an insight into the relevant industry and the learning programme
- using a range of appropriate and rigorous selection methods to ensure that candidates are matched to the programme best suited to their needs
- carrying out a thorough induction for candidates to ensure that they completely understand the programme and what is expected of them. For example, the induction should include the requirements of the programme, an initial assessment of current competency levels, assessment of individual learning styles, identification of training needs, an individual learning plan, details of training delivery and the assessment process. It is good practice to involve the employer in the induction process. This helps employers to understand what will be taking place during the programme and enables them to start building a relationship with the centre to support the effective delivery of the programme
- keeping in regular contact with the candidate to keep them engaged and motivated, and ensuring that there are open lines of communication between the candidate, the assessor, the employer and teaching staff.



## Training and assessment delivery

Good practice in relation to training and assessment delivery includes:

- offering flexible delivery and assessment to meet the needs of the employer and candidate through the use of a range of approaches, for example virtual learning environments (VLEs), online lectures, video, printable online resources, virtual visits, webcams for distance training, e-portfolios
- planning opportunities for the development and practising of skills on the job. On-the-job training presents an excellent opportunity to develop the candidate's routine expertise, resourcefulness, craftspersonship and business like attitude. It is, therefore, important that there is intentional structuring of practice and guidance to supplement the learning and development provided through engagement in everyday work activities. Candidates need to have structured time to learn and practise their skills separate from their everyday work activities. Teaching and learning methods, such as coaching, mentoring, shadowing, reflective practice, collaboration and consultation, could be used in this structured on-the-job learning
- developing an holistic approach to assessment by matching evidence to different assessment criteria, learning outcomes and units as appropriate, thereby reducing the assessment burden on candidates and assessors. It is good practice to draw up an assessment plan that aligns the units with the learning process and the acquisition of knowledge and skills, and which indicates how and when the units will be assessed
- discussing and agreeing with the candidate and employer suitable times, dates and work areas where assessment will take place. Candidates and employers should be given regular and relevant feedback on performance and progress.

## Employer engagement

Good practice in relation to employer engagement includes:

- communicating with employers at the start of the programme to understand their business context and requirements so that the programme can be tailored to meet their needs
- working with the employer to ensure that candidates are allocated a mentor in the workplace to assist them in the day-to-day working environment and to act as a contact for the assessor/tutor
- helping the employer to better understand their role in the delivery of the programme. It is important that employers understand that sufficient and relevant work must be given to candidates in order to provide a culture of learning and to ensure that they are given every opportunity to participate in aspects of continuous professional development (CPD).

## 7 Centre resource requirements

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

- Centres must have the appropriate physical resources to support delivery and assessment of the qualification, for example a workplace in line with industry standards, or a realistic working environment (RWE), where permitted, as specified in the assessment strategy for the sector, equipment, IT, learning materials, teaching rooms.
- Where RWE is permitted, it must offer the same conditions as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working.
- Centres must meet any specific human and physical resource requirements outlined in the assessment strategy in *Annexe A*. Staff assessing candidates must meet the occupational competence requirements within the overarching assessment strategy for the sector.
- There must be systems in place to ensure continuing professional development for staff delivering the qualification.
- Centres must have appropriate health and safety policies, procedures and practices in place for the delivery and assessment of the qualification.
- Centres must deliver the qualification in accordance with current equality legislation. For further details on Pearson's commitment to the Equality Act 2010, see *Section 8, Access and recruitment*. For full details on the Equality Act 2010, go to [www.legislation.gov.uk](http://www.legislation.gov.uk) or [www.scotland.gov.uk](http://www.scotland.gov.uk)

## 8 Access and recruitment

Our policy on access to our qualifications is that:

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

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

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

### Prior knowledge, skills and understanding

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No prior knowledge, understanding, skills or qualifications are required before candidates register for this qualification, however it is likely that they may already be employed or seeking employment within the customer service sector.

### Access to qualifications for candidates with disabilities or specific needs

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

We are committed to making sure that:

- candidates with a protected characteristic (as defined by the Equality Act 2010) are not, when they are undertaking one of our qualifications, disadvantaged in comparison to candidates who do not share that characteristic
- all candidates achieve the recognition they deserve from undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

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

## 9 Assessment

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

### Language of assessment

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

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

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

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

### Internal assessment

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

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

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

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

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

- **valid** • relevant to the standards for which competence is claimed
- **authentic** • produced by the candidate
- **consistent** • achieved on more than one occasion
- **current** • usually not more than two years old
- **sufficient** • fully meets the requirements of the performance, behaviour and knowledge outcomes and standards.

Candidates can provide evidence of occupational competence from:

- **current practice** – where evidence is generated from a current job role
- a **programme of development** – where evidence comes from assessment opportunities built into a learning programme. The evidence provided must meet the requirements of the Sector Skills Council's assessment requirements/strategy
- the **recognition of prior learning (RPL)** – where a candidate can demonstrate that they can meet a unit's outcomes and standards through knowledge, understanding or skills they already possess without undertaking a course of development. Candidates must submit sufficient, reliable, authentic and valid evidence for assessment. Evidence submitted that is based on RPL should give the centre confidence that the same level of skill, understanding and knowledge exists at the time of claim as existed at the time the evidence was produced. RPL is acceptable for accrediting a unit, several units, or a whole qualification.

Further guidance is available in our policy document *Recognition of Prior Learning Policy and Process*, available on our website, [qualifications.pearson.com](http://qualifications.pearson.com)

- a combination of these.

## **Assessment requirements/strategy**

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

## Types of evidence

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

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

- direct observation of the candidate's performance by their assessor (O)
- outcomes from oral or written questioning (Q&A)
- products of the candidate's work (P)
- personal statements and/or reflective accounts (RA)
- professional discussion (PD)
- authentic statements/witness testimony (WT)
- expert witness testimony (EWT)
- evidence of recognition of prior learning (RPL).

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

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

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

Further guidance on the requirements for centre quality assurance and internal verification processes is available on our website, [qualifications.pearson.com](http://qualifications.pearson.com)

## Appeals

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

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

## Dealing with malpractice

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

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

## Reasonable adjustments to assessment

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

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

Both documents are on our website, [qualifications.pearson.com](http://qualifications.pearson.com)

## Special consideration

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

- assessment requires the demonstration of practical competence
- criteria have to be met fully
- units/qualifications confer licence to practice.

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

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

Both of the documents mentioned above are on our website, [qualifications.pearson.com](http://qualifications.pearson.com)

## Credit transfer

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

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



## 10 Centre recognition and approval

### Centre recognition

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

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

Guidance on seeking approval to deliver Pearson SVQs is available on our website, [qualifications.pearson.com](http://qualifications.pearson.com)

### Approvals agreement

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

## 11 Quality assurance of centres

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

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

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

- number of assessment sites
- number and throughput of candidates
- number and turnover of assessors
- number and turnover of internal verifiers.

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

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

## 12 Unit format

Each unit has the following sections.

### Unit title

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

### Unit code

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

### SCQF level

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

### Credit points

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

### Unit summary

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

### Unit assessment requirements

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

## **Terminology**

Key terms and concepts that feature in the unit.

## **Assessment outcomes and standards**

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

## **Knowledge and understanding**

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

## **Performance criteria**

The level of competence the candidate has to achieve.

# Unit 1: Communicate in a Customer Service Environment

Unit code:	CFACSF1
SCQF level:	4
Credit points:	4

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## Unit summary

You need to be able to communicate with customers and colleagues using language and concepts that they can understand.

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

Everybody involved in customer service needs to know the customer service content of their job.

## Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

## Terminology

Customer service; language; communication; work with colleagues; follow procedures; give information; types of customer; company procedures; services and products; answer questions; service offer; internal customer; external customer; teamwork; problem solving

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Communicate in a customer service environment

1	who your customers are and the differences between an internal customer and an external customer
2	your organisation's services or products and how to find information about them
3	the connection between customer expectations and customer satisfaction in customer service
4	why good customer service is important to any organisation
5	why organisational procedures and teamwork are important to good customer service
6	the service offer of your organisation and the part you play in delivering it
7	who's who and who does what in delivering customer service in your organisation
8	the main characteristics of typical customers that you deal with, what impresses them and what might upset or annoy them
9	the kinds of information you need to give good service to customers
10	typical customer service problems in your work and who should be told about them
11	how the way you behave affects your customer's service experience

## Performance criteria

### Identify customers and their characteristics and expectations

- |   |  |
|---|--|
| 1 | recognise typical customers and their expectations   |
| 2 | discuss customer expectations with colleagues using recognised customer service language   |
| 3 | follow procedures through which you and your colleagues deliver effective customer service |

### Identify your organisation's services or products

- |   |   |
|---|---|
| 4 | outline your organisation's services or products to customers   |
| 5 | list the information you need to deliver effective customer service and where that information can be found |
| 6 | discuss with colleagues the part you play in delivering your organisation's service offer                   |

## Unit 2:

## Deliver Customer Service within the Rules

Unit code:	CFACSF2
SCQF level:	5
Credit points:	4

---

### Unit summary

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

This unit requires you to show that you know and understand all the rules that apply to customer service delivered by your organisation and how they apply to you and your job.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Industry; rules; legislation; customer service; organisational practices; organisation procedures; security; delivery; health; safety; external regulations; equality; confidentiality



## Assessment outcomes and standards

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

### Knowledge and understanding

#### Deliver customer service within the rules

1	organisational practices and procedures that relate to your customer service work
2	the limits of what you are allowed to do when delivering customer service
3	when and how you should refer to somebody in authority about the rules for delivering customer service
4	how you protect the security of customers and their property
5	how you protect the security of information about customers
6	your health and safety responsibilities as they relate to your customer service work
7	your responsibilities to deliver customer service whilst treating customers equally
8	why it is important to respect customer and organisation confidentiality
9	the main things you must do and not do in your job under legislation that affects your customer service work
10	the main things that you must do and not do in your job under external regulations that affect your customer service work

## Performance criteria

### Follow your organisation's customer service practices and procedures

- |   |  |
|---|--|
| 1 | follow organisational practices and procedures that relate to your customer service work |
| 2 | recognise the limits of what you are allowed to do when delivering customer service      |
| 3 | refer to somebody in authority when you need to  |
| 4 | work in a way that protects the security of customers and their property                 |
| 5 | work in a way that protects the security of data relating to customers                   |

### Follow legislation and external regulation that relate to customer service

- |    |  |
|----|--|
| 6  | work in a way that is safe for your customers and your colleagues  |
| 7  | treat customers equally  |
| 8  | respect confidentiality relating to customers and the organisation   |
| 9  | work in a way that shows you are aware of the areas of your job that are covered by legislation and the things you must not do |
| 10 | work in a way that shows you are aware of the main external regulations that apply to your job and the things you must not     |

## Unit 3:

## Communicate Effectively with Customers

**Unit code:**

**CFACSA3**

**SCQF level:**

**5**

**Credit points:**

**5**

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### Unit summary

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

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Communication; problem solving; behaviours; customer service principles; customer service professional; work with others; customer service language; service offer; knowledge; understanding; problem solving; behaviours; customer service principles; customer

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Communicate effectively with customers

1	the difference between hearing and listening
2	how to listen actively
3	how to read both positive and negative body language
4	how to use body language effectively
5	how to use questions to check that you understand what customers are telling you
6	the difference between negative and positive language
7	how to summarise information
8	why it is important to speak clearly
9	why it is important to use words your customer will understand
10	how to communicate with customers who have language, dialect or accents that are different from yours
11	why the way you say things and your tone of voice affect the way your customer experiences your customer service
12	what information is helpful to pass on in messages to colleagues so that customers receive good service
13	the styles that are appropriate for communicating in the social media you are using and the customers you are dealing with

## Performance criteria

### Communicate effectively with customers

1	listen actively to what customers are saying
2	identify the most important things that customers are telling you
3	respond appropriately to what customers are telling you
4	check that you understand what customers are telling you and make sure it is really what they mean
5	summarise information for customers
6	explain in a way that is clear and does not cause offence when you cannot help a customer
7	use an appropriate tone when communicating with your customers
8	use appropriate body language when communicating with customers
9	read your customers' body language to help you understand their feelings and wishes
10	deal with customers in a respectful, helpful and professional way at all times
11	help to give good customer service by passing messages to colleagues
12	use appropriate styles when dealing with customers through different media

# Unit 4: Give Customers a Positive Impression of Yourself and Your Organisation

**Unit code:** CFACSA4

**SCQF level:** 5

**Credit points:** 5

---

## Unit summary

Excellent customer service is provided by people who are good with people. Your behaviour affects the impression that customers have of the service they are receiving.

This unit is about communicating with your customers and giving a positive impression whenever you deal with a customer. By doing this, you create a positive impression of your organisation and the customer service it provides. All of us enjoy the experience of good customer service if we feel that the person serving us really wants to create the right impression, responds to us, and gives us good information. Every detail of your behaviour counts when dealing with a customer.

## Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

## Terminology

Listening; hearing; speaking; communicate; positive impression; behaviour; problem solving; behaviours; customer service principles; customer service professional; work with others; customer service language; knowledge; understanding; venue; sales; merchants

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Give customers a positive impression of yourself and your organisation

1	your organisation's standards for appearance and behaviour
2	your organisation's guidelines for how to recognise what your customer wants and respond appropriately
3	your organisation's rules and procedures regarding the methods of communication you use when dealing with customers
4	how to recognise when a customer is angry or confused
5	your organisation's standards for timeliness in responding to customer questions and requests for information

## Performance criteria

### Meet your organisation's standards of appearance and behaviour

- |   |   |
|---|---|
| 1 | greet your customer respectfully and in a friendly manner                         |
| 2 | communicate with your customer in a way that makes them feel valued and respected |
| 3 | identify and confirm your customer's expectations                                 |
| 4 | treat your customer courteously and helpfully                                     |
| 5 | keep your customer informed and reassured   |
| 6 | adapt your behaviour to respond to different customer behaviour                   |

### Respond appropriately to customers

- |    |  |
|----|--|
| 7  | respond promptly to a customer seeking help  |
| 8  | choose the most appropriate way to communicate with your customer                                |
| 9  | check with your customer that you have fully understood their expectations                       |
| 10 | respond promptly and positively to your customer's questions and comments                        |
| 11 | allow your customer time to consider your response and give further explanation when appropriate |

### Communicate information to customers

- |    |   |
|----|---|
| 12 | quickly find information that will help your customer   |
| 13 | give your customer information they need about the services or products offered by your organisation    |
| 14 | recognise information that your customer might find complicated and check whether they fully understand |
| 15 | explain clearly to your customers any reasons why their expectations cannot be met                      |



# Unit 5: Promote Additional Services or Products to Customers

Unit code:	CFACSA5
SCQF level:	5
Credit points:	6

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## Unit summary

Services or products are continually changing in organisations to keep up with customers' expectations. By offering new or improved services or products, your organisation can increase customer satisfaction. Many organisations must promote these to be able to survive in a competitive world. However, it is equally important for organisations that are not in competition with others to encourage their customers to try new services or products.

This unit is about your need to keep pace with new developments and to encourage your customers to take an interest in them. Customers expect more and more services or products to be offered to meet their own growing expectations. They need to be made aware of what is available from your organisation. Because of this everybody offering services or products needs to play a part in making customers aware of what is available.

You should not choose this unit if your role does not want you to suggest additional services or products to customers.

## Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

## Terminology

Customer service; services; products; communication; expectations; additional service; understanding; competition; customer satisfaction; gambling; venue; sales; merchants

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Promote additional services or products to customers

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

## Performance criteria

### Identify additional services or products that are available

- |   |   |
|---|---|
| 1 | update and develop your knowledge of your organisation's services or products   |
| 2 | check with others when you are unsure about new service or product details  |
| 3 | identify appropriate services or products that may interest your customer   |
| 4 | spot opportunities for offering your customer additional services or products that will improve their customer experience |

### Inform customers about additional services or products

- |   |  |
|---|--|
| 5 | choose the best time to inform your customer about additional services or products   |
| 6 | choose the best method of communication to introduce your customer to additional services or products                              |
| 7 | give your customer accurate and sufficient information to enable them to make a decision about the additional services or products |
| 8 | give your customer time to ask questions about the additional services or products   |

### Gain customer commitment to using additional services or products

- |    |   |
|----|---|
| 9  | close the conversation if your customer shows no interest   |
| 10 | give information to move the situation forward when your customer shows interest  |
| 11 | secure customer agreement and check customer understanding of the delivery of the service or product                                      |
| 12 | take action to ensure prompt delivery of the additional services or products to your customer   |
| 13 | refer your customer to others or to alternative sources of information if the additional services or products are not your responsibility |

## Unit 6:

## Process Information about Customers

**Unit code:** CFACSA6

**SCQF level:** 5

**Credit points:** 5

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### Unit summary

You and your organisation need information about your customers and their behaviour to answer customer questions and to respond to customer requests. Information about customers is also used by your organisation to develop its customer service. Some customer information is collected from your customers. Other customer information is collected through information systems and equipment that make records of service delivery. In either case you must collect information, retrieve it and supply it when needed. Good customer information provides a sound basis for all customer service transactions. The quality of the customer information depends heavily on the skills and attention to detail of the person dealing with the information.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Customer service; communication; problem solving; behaviours; work with others; team working; gather information; answer questions; respond to requests; collect information; retrieve information; supply information

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Process information about customers

1	your organisation's procedures and guidelines for collecting, retrieving and supplying information about customers
2	types of personal information about customers that should and should not be kept on record
3	how to collect information about customers efficiently and effectively
4	how to operate the customer information storage system
5	why processing information about customers correctly makes an important contribution to effective customer service
6	the importance of attention to detail when processing information about customers
7	legal and regulatory restrictions on the storage and use of customer data

## Performance criteria

### Collect information about customers

- |   |  |
|---|--|
| 1 | collect and record new information about customers following your organisation's guidelines                                |
| 2 | update existing information about customers  |
| 3 | record and store information about customers that is accurate, sufficient and relevant following organisational guidelines |

### Select and retrieve information about customers

- |   |   |
|---|---|
| 4 | respond promptly to authorised requests for information about customers                                       |
| 5 | select and retrieve relevant information for customers or colleagues following your organisation's guidelines |

### Supply information about customers

- |   |   |
|---|---|
| 6 | supply accurate and sufficient information about customers to meet your customers or colleagues' expectations |
| 7 | choose the most appropriate way to supply information to your customers or colleagues                         |
| 8 | confirm that your customers or colleagues have received and understood the customer information               |

## Unit 7:

# Live up to the Brand Promise when Delivering Customer Service

**Unit code:** CFACSA7

**SCQF level:** 5

**Credit points:** 6

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### Unit summary

You may work in an organisation that has a carefully defined brand and vision which includes a specific service offer and promise to your customers. Often, much work has taken place to develop these, and they influence what your customer expects. That service offer and promise are all part of a brand. By promoting the brand, the organisation is making a promise to your customers about what they can expect. Customer satisfaction is unlikely to be achieved if your customer's experience does not match their expectations of that promise. Even in organisations without a strong brand image, customers often have defined expectations.

This unit is about the way your work supports the branding of your services or products. It covers what you must do to make sure that you deliver the promise that your customer has come to expect. It also covers how you can avoid giving your customer an experience that is significantly different from the one offered in the promise.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Branding; services; products; customer service; communication; problem solving; behaviours; work with others; team working; promises

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Live up to the brand promise when delivering customer service

1	the brand promise made by your organisation's promotional materials
2	the key features, moments of truth (those points in the customer service process that have the most impact on the customer experience) and customer experiences that define the organisation's brand
3	ways in which staff can contribute to communicating the brand promise to customers
4	sales, marketing and/or public relations reasons for defining a brand
5	how words can be used and adapted to reflect a brand promise
6	the importance of using words and phrases that reinforce the brand
7	how a brand promise is affected by social media exchanges
8	how actions can be used and adapted to reflect a brand promise



## Performance criteria

### Understand and explain the customer service promise

1	explain the key features of the service offer, vision and promise your organisation has made and which represent its brand
2	identify the role you can play to ensure that your customer believes that the brand promise is being delivered
3	explain the procedures and regulations your organisation follows to support the brand
4	devise and use phrases that reinforce the brand
5	identify and avoid phrases that might be used, but would not fit with the brand
6	identify moments and actions within the delivery of customer service that are particularly relevant to your customer's experience of the promise being delivered
7	share ideas with colleagues about how particular words and approaches help to support the brand promise

### Produce customer satisfaction by delivering the customer service promise

8	ensure that your appearance and behaviour supports the organisation's brand
9	observe or listen to your customer closely to identify opportunities to reinforce their understanding of the brand promise
10	take actions to deliver customer service in a way that meets your customer's expectations and understanding of the brand promise
11	ensure that what you decide to do is realistic and in line with the brand promise and customer expectations
12	be positive and supportive about the brand promise

## Unit 8:

## Make Customer Service Personal

**Unit code:**

**CFACSA8**

**SCQF level:**

**5**

**Credit points:**

**6**

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### Unit summary

Research has shown that customer satisfaction increases if your customer feels that they have been treated in a way that recognises their own personal needs. When you are delivering customer service you often deal with a large number of customers who seem to be the same, but it is important to remember that each customer is an individual. Anything you can do to make each customer feel that they have had your complete attention and have been dealt with personally increases their sense of satisfaction.

This unit is about how you can help your customers feel that they have experienced a service that focuses on them as an individual. When you work with a customer you need to make them feel that it is on a 'one to one' basis, that you care what happens to them and that you respect them as an individual.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Communicating; giving respect; personal touch; customer service; communication; problem solving; behaviours; work with others; team working; balancing time; relationship building

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Make customer service personal

1	how use of your customer's name makes service more personal
2	personality types and their receptiveness to personalised services
3	types of personal information about customers that should and should not be kept on record
4	features of personal service that are most appreciated by customers with individual needs
5	body language and approaches to communication that are generally interpreted as open
6	your organisation's guidelines on actions that are permissible outside of the normal routines and procedures
7	your own preferences and comfort levels relating to how you are willing and able to personalise service
8	the boundaries beyond which personal customer service may be seen as inappropriate
9	how to assess your customer's reaction to personalised customer service
10	how to gain information about a customer's preferences, including through social media

## Performance criteria

### Identify opportunities for making customer service personal

- |   |   |
|---|---|
| 1 | identify which of your organisation's systems or procedures allows you to add a personal touch to your service                |
| 2 | observe and listen to your customer carefully for signs that will guide how you personalise the service                       |
| 3 | let your customer know that you understand and that you are there to help   |
| 4 | identify opportunities to help or direct your customer outside of normal routines and procedures                              |
| 5 | identify customers with particular needs who would especially appreciate personal service                                     |
| 6 | balance the time you take when giving individual attention to one customer with the needs and expectations of other customers |
| 7 | make extra efforts to show how willing and able you are to give a more personal service                                       |

### Treat your customer as an individual

- |    |   |
|----|---|
| 8  | greet and deal with your customer in a way that respects them as an individual                                  |
| 9  | focus your attention on the customer you are dealing with   |
| 10 | always communicate with your customer in a friendly and open way  |
| 11 | use your customer's name when it is known and appropriate   |
| 12 | follow your organisation's guidelines about giving your customer your own name and contact details              |
| 13 | concentrate on building a 'one to one' relationship with your customer by making them feel valued and respected |

## Unit 9:

## Go the Extra Mile in Customer Service

**Unit code:** CFACSA9

**SCQF level:** 5

**Credit points:** 6

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### Unit summary

When your customer feels that you have taken special care to give them good service and have done something more than they expect, they are likely to enjoy a better customer service experience. Opportunities to add this extra value to your customer's experience depend on you spotting what they will particularly appreciate. Often you can offer this little extra when sorting out a difficulty or problem. Whatever special service you give when you "go the extra mile" must be within your own authority or with the authority of an appropriate colleague. It must also take account of the organisation's service offer and all the relevant procedures and regulations. As customers, we all enjoy and remember it when somebody has "gone the extra mile" to deliver special customer service.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Customer service; communication; problem solving; behaviours; work with others; team working; feelings; adding value; appreciation; service offer

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Go the extra mile in customer service

1	your organisation's service offer
2	how customers form expectations of the service they will receive
3	what types of service action most customers will see as adding value to customer service
4	your organisation's rules and procedures that determine your authority to go the extra mile
5	relevant legislation and regulation that impact on your freedom to go the extra mile
6	how your organisation receives customer service feedback on the types of customer experience that has impressed them
7	your organisation's procedures for making changes in its service offer
8	how to monitor feedback from customers and colleagues about actions taken to go the extra mile
9	how to recognise when particular extra mile actions become routine and might be suitably accommodated within the service offer

## Performance criteria

### Distinguish between routine service and going the extra mile

- |   |  |
|---|--|
| 1 | explain the service offer clearly and concisely  |
| 2 | identify your customer's expectations and needs  |
| 3 | match the service offer with your customer's expectations and needs and identify the key differences             |
| 4 | identify options for other actions that will give added value to your customer service and impress your customer |
| 5 | choose actions that are most appropriate to impress your customer  |

### Check that your extra mile ideas are feasible

- |   |  |
|---|--|
| 6 | match your ideas for added value customer service against your authority to see them through   |
| 7 | check that your ideas for added value customer service are allowed within your organisation's guidelines and by external regulations |
| 8 | check that your ideas for added value customer service will not affect the service to your other customers                           |
| 9 | explain your ideas for added value service to a senior colleague or other appropriate authority                                      |

### Go the extra mile in customer service

- |    |   |
|----|---|
| 10 | take action to go the extra mile in customer service  |
| 11 | ensure that your customer is aware of the added value of your actions   |
| 12 | monitor the effects of your added value actions to ensure that the service given to your other customers are unaffected |
| 13 | note and pass on positive feedback from your customer about your actions  |
| 14 | monitor feedback about customer reactions to actions taken to go the extra mile   |

## Unit 10:

## Deal with Customers Face to Face

**Unit code:** CFACSA10

**SCQF level:** 5

**Credit points:** 5

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### Unit summary

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

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Face to face; satisfaction; relationships; impression formation; customer service; communication; problem solving; behaviours; work with others; team working



## Assessment outcomes and standards

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

### Knowledge and understanding

#### Deal with customers face to face

1	the importance of speaking clearly and slowly when dealing with a customer face to face
2	the importance of taking the time to listen carefully to what your customer is saying
3	your organisation's procedures that impact on the way you are able to deal with your customers face to face
4	the features and benefits of your organisation's services or products
5	your organisation's service offer and how it affects the way you deal with customers face to face
6	the principles of body language that enable you to interpret customer feelings without verbal communication
7	the differences between behaving assertively, aggressively and passively
8	why the expectations and behaviour of individual customers will demand different responses to create rapport and achieve customer satisfaction
9	the agreed and recognised signs in customer behaviour in your organisation that indicate that your customer expects a particular action by you.

## Performance criteria

### Communicate effectively with your customer

- |   |  |
|---|--|
| 1 | plan a conversation with your customer that has structure and clear direction  |
| 2 | hold a conversation with your customer that establishes rapport  |
| 3 | focus on your customer and listen carefully to ensure that you collect all possible information you need from the conversation |
| 4 | explain your services or products and your organisation's service offer to your customer clearly and concisely                 |
| 5 | adapt your communication to meet the individual needs of your customer   |
| 6 | anticipate your customer's requests and needs for information  |
| 7 | balance conflicting demands for your attention whilst maintaining rapport with your current customer                           |
| 8 | calm down the situation when one customer is adversely affecting the customer service enjoyed by other customers               |

### Build rapport with your customer through body language

- |    |  |
|----|--|
| 9  | present a professional and respectful image when dealing with your customer                                  |
| 10 | show an awareness of your customer's needs for personal space  |
| 11 | focus attention on your customer so that non-verbal signs do not indicate disinterest, boredom or irritation |
| 12 | ensure that your customer focus is not interrupted by colleagues   |
| 13 | observe all customers and the total customer service situation whilst maintaining rapport with your customer |
| 14 | observe your customer to read non-verbal clues about their wishes and expectations                           |

## Unit 11:

## Deal with Incoming Telephone Calls from Customers

**Unit code:** CFACSA11

**SCQF level:** 5

**Credit points:** 5

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### Unit summary

Many organisations deal with incoming telephone calls as a key part of their customer service. Customer expectations are high when calling organisations because they have had an opportunity to prepare for their call. In addition, many calls start with customers in a negative frame of mind because they see making a call as a way of dealing with a customer service problem.

This unit is about being prepared to deal effectively with calls and using effective communication to satisfy customers with the outcome of each incoming call.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Telephone; customer expectations; callers; effective communication; calls; telecommunication; give information; receive information; conversations

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Deal with incoming telephone calls from customers

1	your organisation's guidelines and procedures for the use of the telecommunications system
2	how to operate your organisation's telecommunications system
3	the importance of speaking clearly and slowly when dealing with customers by telephone
4	the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone
5	the importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand
6	what information it is important to note during or after telephone conversations with customers
7	your organisation's guidelines and procedures for what should be said during telephone conversations with customers
8	the importance of keeping your customer informed if they are on hold during a call
9	the importance of not talking across an open line
10	what details should be included if taking a message for a colleague
11	your organisation's guidelines and procedures for taking action to follow up calls made to customers
12	your organisation's guidelines for handling abusive calls

## Performance criteria

### Use telecommunications systems effectively

- |   |  |
|---|--|
| 1 | operate telecommunications equipment efficiently and effectively                               |
| 2 | speak clearly and slowly and adapt your speech to meet the individual needs of your customer   |
| 3 | listen carefully when collecting information from your customer                                |
| 4 | select the information you need to record and store following your organisation's guidelines   |
| 5 | update customer records during or after the call to reflect the key points of the conversation |

### Establish rapport with customers who are calling

- |   |  |
|---|--|
| 6 | greet your customer following your organisation's guidelines   |
| 7 | listen closely to your customer to identify their precise reason for calling and what outcome they are seeking from the call |
| 8 | confirm the identity of your customer following organisational guidelines  |
| 9 | use effective and assertive questions to clarify your customer's requests  |

## Performance criteria

### Deal effectively with customer questions and requests

10	identify the options you have for responding to your customer and weigh up the benefits and drawbacks of each
11	choose the option that is most likely to lead to customer satisfaction within the service offer
12	give clear and concise information to customers in response to questions or requests
13	use questions and answers to control the length of the conversation
14	keep your customer informed about your actions when accessing information to provide responses or if they are going to be on hold for a period of time
15	put your customer on hold and ensure you cannot be heard if you are discussing action with others or calling a colleague
16	summarise the outcome of the call and any actions that you or your customer will take as a result
17	check before the call is finished that your customer is content that all their questions or requests have been dealt with
18	complete any follow up actions agreed during the call
19	take a clear message for a colleague if you are unable to deal with some aspect of your customer's questions or requests
20	ensure that promises to call back are kept

## Unit 12:

## Make Telephone Calls to Customers

**Unit code:** CFACSA12

**SCQF level:** 5

**Credit points:** 6

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### Unit summary

Many customer service jobs involve contacting customers by telephone. Making an effective telephone call involves very specific actions and should not be seen as a casual activity. By making a call to a customer you have the opportunity to prepare and you are therefore more likely to be able to lead the conversation in the direction you want it to go.

This unit is about planning and making calls to customers in a way that contributes positively to your organisation's customer service.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Customer service; communication; problem solving; behaviours; work with others; team working; outgoing telephone; outbound; conversation; planning; communication; focusing; summarise

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Make telephone calls to customers

1	relevant parts of legislation, external regulations and your organisation's procedures relating to the use of customer information to plan calls
2	how to make use of information, including information through social media, about your customer when making a call
3	your organisation's guidelines and procedures for the use of the telecommunications system
4	how to operate your organisation's telecommunications system
5	the importance of speaking clearly and slowly when dealing with customers by telephone
6	the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone
7	the importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand
8	what information it is important to note during or after telephone conversations with customers
9	your organisation's guidelines and procedures for what should be said and not said during telephone conversations with customers
10	your organisation's guidelines and procedures for taking action to follow up calls made to customers



## Performance criteria

### Plan your calls effectively

- |   |   |
|---|---|
| 1 | use appropriate customer information to plan your call  |
| 2 | anticipate your customer's expectations and assemble all the information you might need before your conversation with your customer |
| 3 | identify the objective of your call and the way in which you want the call to end   |
| 4 | plan the opening part of your conversation with your customer and anticipate their possible responses                               |

### Use telecommunications systems effectively

- |   |  |
|---|--|
| 5 | operate telecommunication equipment efficiently and effectively                                |
| 6 | speak clearly and slowly and adapt your speech to meet the individual needs of your customer   |
| 7 | listen carefully when collecting information from your customer                                |
| 8 | select the information you need to record and store following your organisation's guidelines   |
| 9 | update customer records during or after the call to reflect the key points of the conversation |

### Make focussed calls to your customer

- |    |   |
|----|---|
| 10 | open the conversation positively and establish a rapport with your customer                       |
| 11 | confirm the identity of your customer following organisational guidelines                         |
| 12 | ensure that your customer is aware of the purpose of your call as early as possible               |
| 13 | respond positively to queries and objections from your customer                                   |
| 14 | summarise the outcome of the call and any actions that you or your customer will take as a result |
| 15 | complete any follow up actions agreed during the call   |

# Unit 13: Deal with Customers Using a Social Media Platform

**Unit code:** CFACSA19

**SCQF level:** 5

**Credit points:** 3

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## Unit summary

Many organisations interact with their customers through a variety of social media platforms. The evolution of internet-based communication channels has led to customers choosing that medium for a wide range of communication with organisations providing services or products. Customers form expectations through the way the organisation presents itself in web-based communications and by the way it responds to customers and potential customers.

Expectations are also affected by the conventions and functions of a particular platform and by other customers and network contacts who act as influencers. The reputation of your organisation can be directly affected by social media interactions and in particular the way you deal with negative reactions and problems which find their way into a public arena.

This unit is about being prepared to deal effectively with customer contact through social media platforms and using social media to satisfy customers by meeting their expectations.

Do not choose this unit if your organisation does not expect you to make routine and regular use of social media for customer service.

## Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

## Terminology

Social media; customer service; communications; searches; social media platforms; information; customer questions; customer service information

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Deal with customers using a social media platform

1	your organisation's guidelines for dealing with customers through social media
2	ways to communicate customer service information to social media communities
3	how to search social media sources for postings by customers
4	how to anticipate your customer's requests and needs
5	the importance of interpreting your customer's feelings and perceptions from postings on social media networks
6	the conventions of social media platforms your customers choose to use
7	the importance of sending clear and concise messages when using social media platforms
8	how to control access to exchanges with customers using social media security settings
9	what details to share with a colleague if more than one of you become involved in exchanges with a customer using social media
10	how to recognise what should be the closing step in a series of social media exchanges with a customer

## Performance criteria

### Use a social media platform effectively

- |   |  |
|---|--|
| 1 | scan social media exchanges to identify relevant customer communications                                       |
| 2 | respond to direct queries or requests through social media communications following organisational guidelines  |
| 3 | explain your services or products and your organisation's service offer clearly and concisely to your customer |
| 4 | adapt your response using social media to your customer's precise needs  |
| 5 | anticipate your customer's requests and needs for information  |
| 6 | respond to social media communications and requests within organisational response time guidelines             |

### Establish a rapport with customers using social media

- |    |   |
|----|---|
| 7  | present a professional and respectful image when dealing with your customer                     |
| 8  | ensure that you interpret your customer's feelings from the tone and approach of their postings |
| 9  | respond to your customer in a way that shows you understand their feelings                      |
| 10 | follow the conventions of the chosen social media platform when responding to customers         |

### Deal effectively with customer questions and requests

- |    |   |
|----|---|
| 11 | search social media sources to identify customer questions and requests   |
| 12 | use direct and effective questions to clarify your customer's requests  |
| 13 | give clear and concise information in response to questions and requests  |
| 14 | check the security settings of the social media platform if you make a private response to a customer                                 |
| 15 | ensure that no further response is expected by your customer when dealing with a closing contact                                      |
| 16 | take customer service opportunities to impress any other members of a social media community who see how you dealt with your customer |

## Unit 14:

## Deliver Reliable Customer Service

**Unit code:** CFACSB2

**SCQF level:** 5

**Credit points:** 5

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### Unit summary

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

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Reliability; delivery; service systems; customer expectations; efficiency; balance needs; customer service; communication; problem solving; behaviours; work with others; teamwork; sales; merchants

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Deliver reliable customer service

1	your organisation's services or products
2	your organisation's procedures and systems for delivering customer service
3	methods or systems for measuring an organisation's effectiveness in delivering customer service
4	your organisation's procedures and systems for checking service delivery
5	your organisation's requirements for health and safety in your area of work

## Performance criteria

### Prepare to deal with your customers

- |   |   |
|---|---|
| 1 | keep your knowledge of your organisation's services or products up to date  |
| 2 | ensure that the area you work in is tidy, safe and organised efficiently  |
| 3 | prepare and arrange everything you need to deal with your customers before your shift or period of work commences |

### Give consistent service to customers

- |   |  |
|---|--|
| 4 | make realistic customer service promises to your customers   |
| 5 | ensure that your promises balance the needs of your customers and your organisation  |
| 6 | keep your promises to your customers   |
| 7 | inform your customers if you cannot keep your promises due to unforeseen circumstances                                     |
| 8 | recognise when your customers' needs or expectations have changed and adapt your service to meet their new requirements    |
| 9 | keep your customers informed if delivery of the service needs to involve passing them on to another person or organisation |

### Check customer service delivery

- |    |   |
|----|---|
| 10 | check that the service you have given meets your customers' needs and expectations                                |
| 11 | identify when you could have given better service to your customers and how your service could have been improved |
| 12 | share information with colleagues and service partners to maintain and improve your standards of service delivery |

## Unit 15:

## Deliver Customer Service on your Customer's Premises

Unit code:	CFACSB3
SCQF level:	5
Credit points:	5

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### Unit summary

Many organisations deliver a service to their customers on the customer's own premises. This requires sensitive handling as people are particularly protective about their own personal space. In this situation there is always the potential to detract from excellent customer service by using inappropriate language or behaviour or even by causing accidental damage to your customer's property.

This unit is about the process of providing a service on customer premises whilst ensuring that your customer both enjoys the customer service experience and has confidence that the work you have carried out has been completed successfully. This unit is not simply about working in a different building. Your customer must be somebody who feels real ownership of the premises and is therefore somewhat protective about them.

In particular, this unit is for you if your job takes you into your customers' homes.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Delivery; premises; homes; customer service; communication; problem solving; behaviours; work with others; team working



## Assessment outcomes and standards

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

### Knowledge and understanding

#### **Deliver customer service on your customer's premises**

1	what you can do to establish a rapport with customers
2	the importance of sensitivity to people's feelings about their own premises and possessions
3	the regulatory and legal restrictions on what you can and cannot do in all aspects of your work
4	the insurance implications of working on your customer's premises
5	the organisational procedures to follow if you cause any accidental damage on your customer's premises

## Performance criteria

### Establish a rapport with your customer

1	prepare for a visit to your customer's premises and ensure they know when and why you will be there
2	identify yourself to your customer showing official identification whenever possible
3	show a positive and friendly approach to the service you are about to give
4	use language and behaviour that show respect for your customer
5	explain to your customer exactly what you are going to do and approximately how long you expect the work to take
6	listen to any concerns that your customer may have and reassure them
7	keep your customer informed of progress and about any cause for delay that might take place
8	keep your customer informed of any variation to the work that could involve additional time or cost
9	consult your customer when you have to do work that they had not expected

## Performance criteria

### Combine customer service with your other skills and expertise

10	show respect to your customer's premises and possessions by treating them with care
11	make sure your customer is aware of your specialist technical skills
12	take time to give your customer confidence in your knowledge and skills
13	consider the customer service implications of each action and inform your customer of what will be involved
14	inform your customer when you have finished and reinforce how the work has been handled professionally
15	check that your customer is satisfied with the work and listen carefully to any feedback
16	inform your customer of timescales if any follow up work is involved
17	ensure that timescales for follow up work are kept
18	keep your customer informed if timescales for follow up work are not going to be met
19	explain clearly to your customer why you cannot do work that is not specified in the service offer
20	ensure that your customer has the appropriate details to contact your organisation if they need to

## Unit 16:

## Recognise Diversity when Delivering Customer Service

**Unit code:** CFACSB4

**SCQF level:** 5

**Credit points:** 5

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### Unit summary

Many customer service situations involve dealing with diverse groups of people inclusively and with respect. Responses to diversity can lead to discrimination that might or might not be deliberate. Discrimination can result from simply not knowing the beliefs and preferences of different groups or may result from actions based on stereotyping rather than on solid evidence obtained from your customer.

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

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Diversity; recognition; discrimination; beliefs; preferences; stereotyping; customer expectations; individual; customer service; communication; problem solving; behaviours; work with others; teamwork; venue

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Recognise diversity when delivering customer service

1	the importance of recognising diversity in relation to legal, regulatory, ethical and social requirements
2	reasons why consideration of diversity and inclusion issues affect customer service
3	organisational guidelines to make customer service inclusive for diverse groups of customers
4	how to observe and interpret non-verbal clues
5	how to listen actively for clues about your customer's expectations and needs
6	techniques for obtaining additional information from customers through tactful and respectful questions
7	behaviour that might cause offence to specific groups of people to whom you regularly provide customer service
8	how to impress specific groups of people to whom you regularly provide customer service

## Performance criteria

### Respect customers as individuals and promote equality in customer service

1	observe verbal and non-verbal clues that provide information about your customer's expectations and needs
2	identify and avoid features of stereotypes that might be applied to your customer and could carry the risk of causing offence
3	identify aspects of your customer's appearance or communication which risk leading you to treat them differently
4	consider aspects of your customer's appearance or communication in the light of your own beliefs about various groups of people that include your customer
5	question your customer to ensure that the impressions you are forming about their expectations and wishes are based on sound evidence
6	adjust your interpretation of your customer's expectations and wishes as a result of further evidence you have collected by talking to your customer

### Adapt customer service to recognise the different needs and expectations of diverse groups of customers

7	follow organisational procedures and guidelines that seek to make customer service inclusive for diverse groups of customers
8	show respect for your customer's individual beliefs, expectations and needs that may result from their membership of a particular group
9	vary your approach to your customer to take account of their beliefs, expectations and needs that result from their membership of a particular group
10	work with colleagues to identify consistent approaches that team members should adopt when dealing with a particular group

# Unit 17: Deal with Customers across a Language Divide

Unit code:	CFACSB5
SCQF level:	5
Credit points:	8

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## Unit summary

Customer service is frequently delivered across a language divide. Customer service centres may be located in one country but deal mainly with another. In a multi-cultural society many customers may have a different first language from those who are delivering customer service. This language divide can present a challenge to those who deliver customer service.

This unit is about preparing to deliver customer service across a language divide and seeing through that delivery. The unit covers the steps that are needed to deal with customers with different language preferences without having full access to your customer's first language.

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

## Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

## Terminology

Meeting; greeting conversation; language barrier; language; first language; language divide; words; phrases; tone; volume; customer service; communication; problem solving; behaviours; work with others; teamwork; venue

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Deal with customers across a language divide

1	which languages you are most likely to encounter among groups of your customers
2	how to greet, thank and say farewell to customers in their first languages
3	the importance of dealing with customers in their first language if possible
4	how to explain to a customer that you cannot hold an extended conversation in their first language
5	the importance of tone, pace and volume when dealing with customers across a language divide
6	possible sources of assistance to use when a language barrier demands additional language skills



## Performance criteria

### Prepare to deal with customers with a different first language

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

### Deal with customers who speak a different first language from your own

7	identify your customer's first language and indicate to them that you are aware of this
8	establish the expectations of your customer regarding whether they expect to deal in your first language or theirs
9	speak clearly and slowly if using a language which is not the first language for either you or your customer
10	maintain a consistent tone and volume when dealing with somebody across a language divide
11	listen closely to your customer to identify any words they may be using in a way that differs from the way you would generally use the same words
12	check your understanding of specific words with your customer using questions for clarification
13	seek appropriate assistance from colleagues if you are unable to complete a customer transaction because of language barriers
14	reword a question or explanation if your customer clearly does not understand your original wording
15	use a few words of your customer's first language to create a rapport

## Unit 18:

# Use Questioning Techniques when Delivering Customer Service

**Unit code:**

**CFACSB6**

**SCQF level:**

**5**

**Credit points:**

**4**

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### Unit summary

This unit is about how you use questioning both in planned sequences and in spontaneous conversation to paint a picture of what your customer wants and how your organisation can deliver it.

This unit is for you if you come into contact with your customer face to face, by voice technology or on-line with immediate interaction.

This unit is probably not for you if you deal with customers remotely when it takes time to exchange questions and responses.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Questioning; delivery; conversation; rapport; closed questions; open questions; customer service; communication; problem solving; behaviours; work with others; teamwork

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Use questioning techniques when delivering customer service

1	why establishing rapport makes it easier to draw information from customers
2	ways to greet customers that immediately build rapport
3	reasons for using planned question patterns to draw out particular information
4	reasons for using spontaneous conversation to draw out particular information
5	the importance of active listening when seeking detailed information from customers
6	the differences between and uses of closed and open questions
7	the importance of explaining to customers why information is needed
8	why particular trigger questions are effective in gaining specific information
9	how to question and respond effectively using a chosen channel of communication or social media platform

## Performance criteria

### Establish rapport and identify customer concerns

1	greet your customer sincerely and invite a full and open response
2	use planned or spontaneous lines to indicate to your customer that you empathise with their initial enquiry
3	invite more detailed explanation from your customer
4	listen closely to your customer's responses to strengthen your understanding of their concerns
5	use both open and closed questions to make appropriate connection with your customer and open the door to more detailed investigation
6	identify and note your customer's feelings and mood in relation to the information you are seeking

### Seek detailed information from customers using questioning techniques

7	follow a planned trail of questions to explore in detail customer concerns you have already identified
8	hold a spontaneous conversation with your customer to explore in detail customer concerns you have already identified
9	explain to your customer why you need the information you are asking for
10	use probing and searching questions that draw on comments or words used by your customer
11	thank your customer for the information in a way that encourages further open responses
12	follow organisational procedures to record your customer responses to inform future actions

## Unit 19:

## Deal with Customers Using Bespoke Software

**Unit code:**

**CFACSB7**

**SCQF level:**

**5**

**Credit points:**

**5**

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### Unit summary

Customer service is often delivered using bespoke software when dealing with customers face-to-face, by telephone or on-line. For the process to be effective, you must be able to navigate the system quickly by directly following recommended routes and using all the functionality of the system. Customers are unaware of the details of the system you are using and they must be kept informed of the different steps you are taking. Your use of the system must also ensure that you keep appropriate records of the transaction so that it can proceed successfully through the next stages. Most of all, customer satisfaction must drive the interaction and it should not appear to be dominated by the demands of the software.

This unit is for you if you are responsible for delivering service to customers at the same time as operating bespoke service software.

Do not choose this unit if you do not make regular use of a bespoke software system when dealing with customers.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Bespoke software; contact centres; telephone; online; functionality; customer service; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information services; products; venue

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Deal with customers using bespoke software

1	access and sign-on routines for the bespoke software system
2	the architecture and geography of the bespoke software system
3	different screen or menu routes that can be followed to meet customer requirements
4	sources of support and help for the bespoke software including manuals, help screens and help lines
5	the importance of preparing a work area before delivering customer service
6	search or other enquiry facilities within the bespoke software system
7	the importance of avoiding jargon and system terminology when communicating with customers
8	ways to respond to error messages when using a bespoke software system
9	referral points and sources of information when you are unable to meet customer needs using the bespoke software system
10	links between the bespoke software system and open networks or social media platforms that may be appropriate for communication with your customers

## Performance criteria

### Prepare to deliver customer service using bespoke software

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

### Deliver customer service using bespoke software

6	identify your customer or the services or products they wish to access
7	follow organisational procedures to step through the system in a way that responds to your customer's needs
8	use search or other specialist functions within the software to respond to customer requests
9	enter new records using the bespoke software system
10	amend customer service records in the bespoke software system
11	communicate with your customers in terms they can understand relating to the software system
12	follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software
13	interpret error messages and act on them to support your customer service
14	refer your customer to a colleague following organisational procedures if you are unable to complete the transaction

## Unit 20:

## Maintain Customer Service through Effective Handover

**Unit code:** CFACSB8

**SCQF level:** 5

**Credit points:** 5

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### Unit summary

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

This unit is for you if your job involves service delivery as part of a team and you regularly pass on responsibility for completion of a customer service action to a colleague.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Delivery; responsibility; colleagues; working together; customer service; communication; problem solving; behaviours; work with others; giving information; teamwork; receiving information services; products



## Assessment outcomes and standards

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

### Knowledge and understanding

#### Maintain customer service through effective handover

1	your organisation's customer service procedures for the services or products you are involved in delivering
2	the appropriate colleagues to pass responsibility to for completing particular customer service actions
3	ways of ensuring that information is passed between you and your colleagues effectively
4	organisational procedures and acceptable communication media and platforms for passing information to colleagues
5	ways to remind yourself of actions that need to be checked when you have passed on responsibility to a colleague
6	the importance of checking tactfully with a colleague whether they have completed the customer service actions you were expecting
7	opportunities for contributing to review the way customer service actions are shared in customer service processes

## Performance criteria

### Agree joint responsibilities in a customer service team

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

### Check that customer service actions are seen through by working together with colleagues

6	access reminders to identify when to check that a customer service action has been completed
7	ensure that you are aware of all details of customer service actions your colleague was due to complete
8	ask your colleague about the outcome of their completing the customer service action as agreed
9	identify the next customer service actions if your colleagues has been unable to complete the actions you had previously agreed
10	work with colleagues to review the way in which customer service actions are shared

## Unit 21:

## Deliver Customer Service in an Environmentally Friendly and Sustainable way

**Unit code:** CFACSB17

**SCQF level:** 5

**Credit points:** 3

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### Unit summary

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

This unit addresses the balances that must be found when delivering customer service while meeting environmental units. The unit is appropriate for you if your organisation has a clear commitment to sustainability and if aspects of your job role make a direct contribution to that.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

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

## Assessment outcomes and standards

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

### Knowledge and understanding

#### **Deliver customer service in an environmentally friendly and sustainable way**

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

## Performance criteria

### **Follow organisational policies and procedures to deliver customer service in an environmental and sustainable way**

1	encourage customers to contribute to your organisation's environmental policies
2	keep customers informed about your organisation's environmentally friendly and sustainable policies
3	contribute to activities and actions to improve your organisation's environmentally friendly approach
4	follow your organisation's procedures to promote environmentally friendly and sustainable approaches when dealing with service partners
5	keep service partners informed about your organisation's environmentally friendly and sustainable policies

### **Contribute to the development of environmentally friendly and sustainable customer service procedures**

6	identify opportunities for energy and carbon emission savings when following organisational customer service procedures
7	identify opportunities for waste management improvements when following organisational customer service procedures
8	follow organisational procedures to inform those with appropriate authority of opportunities to improve environmental aspects of customer service
9	work with colleagues to implement environmental improvements in customer service
10	communicate with customers about environmental improvements in customer service

## Unit 22:

## Resolve Customer Service Problems

**Unit code:** CFACSC3

**SCQF level:** 5

**Credit points:** 6

---

### Unit summary

This unit is about what to do when it is difficult to meet customer expectations. Even if the service you give is excellent, some customers experience problems. Part of your job is to help to resolve those problems. There is likely to be a problem if customer expectations are not met. This may be because your customer's expectations involve more than you can offer or because your service procedures have not been followed. Some problems are reported by customers and sometimes you spot the problem first and resolve it before your customer has even noticed. As soon as you are aware of a problem, you need to consider the options and then choose a way to put it right.

This unit is particularly important in customer service because many customers judge how good the customer service of your organisation is by the way problems are handled.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Handling problems; resolving problems; customer expectations; choosing options; customer service; communication; problem solving; behaviours; work with others; giving information; teamwork; receiving information services; products; venue

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Resolve customer service problems

1	organisational procedures and systems for dealing with customer service problems
2	how to defuse potentially stressful situations
3	how to negotiate
4	the limitations of what you can offer your customer
5	types of action that may make a customer problem worse and should be avoided
6	how to choose the most effective method of communication when dealing with customer service problems
7	how to make best use of remote communications with customers through social media when resolving customer problems

## Performance criteria

### Spot customer service problems

- |   |  |
|---|--|
| 1 | listen carefully to your customers about any problem they have raised                    |
| 2 | ask your customers about the problem to check your understanding                         |
| 3 | recognise repeated problems and alert the appropriate authority                          |
| 4 | share customer feedback with others to identify potential problems before they happen    |
| 5 | identify problems with systems and procedures before they begin to affect your customers |

### Pick the best solution to resolve customer service problems

- |    |  |
|----|--|
| 6  | identify the options for resolving a customer service problem  |
| 7  | choose the most effective method of communication for dealing with your customer when resolving a customer service problem |
| 8  | work with others to identify and confirm the options to resolve a customer service problem                                 |
| 9  | work out the advantages and disadvantages of each option for your customer and your organisation                           |
| 10 | pick the best option for your customer and your organisation   |
| 11 | identify for your customer other ways that problems may be resolved if you are unable to help                              |

### Take action to resolve customer service problems

- |    |   |
|----|---|
| 12 | discuss and agree the options for solving the problem with your customer                                  |
| 13 | take action to implement the option agreed with your customer   |
| 14 | work with others and your customer to make sure that any promises related to solving the problem are kept |
| 15 | keep your customer fully informed about what is happening to resolve the problem                          |
| 16 | check with your customer to make sure the problem has been resolved to their satisfaction                 |
| 17 | give clear reasons to your customer when the problem has not been resolved to their satisfaction          |



## Unit 23:

## Deliver Customer Service to Challenging Customers

Unit code:	CFACSC4
SCQF level:	5
Credit points:	6

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### Unit summary

Many organisations have a significant proportion of customers who are challenging to deal with. Your customer's attitude may be challenging because they believe that a threat or problem exists before they have contacted your organisation. They may become worried or angry when they discover that their expectations are not going to be met by your organisation. They may be very concerned or nervous about the outcome of dealing with your organisation. In either case, they are challenging to deal with and need your understanding.

This unit is about dealing directly with these customers and trying to reach a resolution that satisfies everybody or at least reduces the risk of dissatisfaction. You should choose this unit only if you recognise the content as applying to a reasonable proportion of your exchanges with customers. Do not choose this unit if it will be hard to find evidence because you only occasionally deal with customers you find challenging.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Problem solving; handling problems; difficult customers; dissatisfaction; customer service; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information services; products; venue

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Deliver customer service to challenging customers

1	the types of customer behaviour that you personally find challenging to deal with
2	reasons why some aspect of your organisation's services or products may provoke challenging behaviour from customers
3	reasons why your customer's own actions may cause them to behave in a way that is challenging to deal with
4	the meaning of having empathy for a customer's feelings
5	who can be asked for help when dealing with a challenging customer
6	the differences between assertive, aggressive and passive behaviour
7	the importance of not simply quoting your organisation's rules and procedures to counter your customer's challenging behaviour
8	your organisation's limits of what will be tolerated from challenging customers before the transaction or relationship is closed
9	the importance of giving your manager or the appropriate colleagues notice of any further approaches from a challenging customer
10	when it might be necessary to take action to protect your own safety or that of other customers or colleagues from a challenging customer

## Performance criteria

### Recognise when customers may be challenging to deal with

- |   |  |
|---|--|
| 1 | recognise types of customer behaviour that are challenging to deal with                                      |
| 2 | identify aspects of your organisation's services or products that make it challenging to deal with customers |
| 3 | identify the signs and signals that indicate a customer may be challenging to deal with                      |
| 4 | put yourself in your customer's position and see the situation from their point of view                      |
| 5 | identify reasons why your customers may be behaving in a way that is challenging to deal with                |
| 6 | recognise the limits of challenging customer behaviour that your organisation will tolerate                  |
| 7 | identify things that you may do or say that will provoke challenging responses from your customer            |

### Deal with customers who are challenging

- |    |  |
|----|--|
| 8  | listen patiently to what your customer wants to tell you   |
| 9  | use direct and factual questions about your customer's feelings and what has happened to identify what might satisfy them                                  |
| 10 | check your understanding of your customer's concerns by describing your view of the situation and options that might be available                          |
| 11 | express empathy with your customer without necessarily admitting fault on the part of your organisation  |
| 12 | give clear statements or explanations of your organisation's position  |
| 13 | agree a way forward that balances customer satisfaction with the needs of your organisation  |
| 14 | enlist help from colleagues if options for action are outside of your authority  |
| 15 | summarise clearly actions to be taken and reasons for those actions to complete the customer transaction   |
| 16 | advise your manager or the appropriate colleagues if your customer is likely to re-open the matter with them   |
| 17 | take any necessary action to protect your own safety or that of other customers or colleagues when dealing with a customer who is challenging or difficult |

# Unit 24: Monitor and Solve Customer Service Problems

Unit code:	CFACSC5
SCQF level:	6
Credit points:	6

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## Unit summary

Your job involves delivering and organising excellent customer service. However good the service provided, some of your customers will experience problems and you will spot and solve other problems before your customers even know about them.

This unit is about the part of your job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems.

Remember that some customers judge the quality of your customer service by the way that you solve customer service problems. You can impress customers and build customer loyalty by sorting out those problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.

## Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

## Terminology

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

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Monitor and solve customer service problems

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

## Performance criteria

### Solve immediate customer service problems

- |   |   |
|---|---|
| 1 | respond positively to customer service problems following organisational guidelines                             |
| 2 | solve customer service problems when you have sufficient authority  |
| 3 | work with others to solve customer service problems   |
| 4 | keep customers informed of the actions being taken  |
| 5 | check with customers that they are comfortable with the actions being taken                                     |
| 6 | solve problems with service systems and procedures that might affect customers before they become aware of them |
| 7 | inform managers and colleagues of the steps taken to solve specific problems                                    |

### Identify repeated customer service problems and options for solving them

- |    |   |
|----|---|
| 8  | identify repeated customer service problems   |
| 9  | identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option                          |
| 10 | work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of your organisation |

### Take action to avoid the repetition of customer service problems

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

## Unit 25:

## Apply Risk Assessment to Customer Service

**Unit code:** CFACSC6

**SCQF level:** 7

**Credit points:** 10

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### Unit summary

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

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

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

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Apply risk assessment to customer service

1	your organisation's customer service process and the moments of truth (those points in the customer service process that have most impact on the customer experience)
2	risk assessment techniques
3	how to evaluate risk using the probability of occurrence and consequences of occurrence
4	the nature of potential customer service risks including financial, reputational and health and safety risks
5	cost/benefit analysis
6	SWOT (Strengths, Weaknesses, Opportunities, Threats) and PESTLE (Political, Economic, Social, Technological, Legal, Environmental) analysis



## Performance criteria

### Analyse customer service processes for risk

1	identify different steps and stages in the customer service process and the moments of truth that offer most opportunity to impress or to disappoint customers
2	identify the financial risks in each stage of the customer service process
3	identify the reputational risks in each stage of the customer service process
4	identify the health and safety risks in each stage of the customer service process
5	identify the risk of delivering sub-standard services or products in each stage of the customer service process
6	ensure that your customers are aware of any risks that might impact on them
7	develop staff awareness of the risks you have identified

### Assess customer service risks and take appropriate actions

8	assess the probabilities of each risk that you have identified
9	assess the potential consequence of each risk in terms of finance, reputation and health and safety
10	classify each risk as high, medium or low taking into account its probability and potential consequences
11	work with colleagues to identify any actions that might be taken to reduce risk
12	take appropriate actions to minimise the overall customer service risk profile by adapting procedures

## Unit 26:

## Process Customer Service Complaints

**Unit code:** CFACSC7

**SCQF level:** 7

**Credit points:** 6

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### Unit summary

This unit is about the process of handling complaints. In any customer service situation a customer who is not satisfied may resort to making a complaint. Complaints may be justified or unjustified but in either case your customer expects you to respond and to offer some resolution or compensation. Complaints require investigation and the different options for their resolution to be considered. Your organisation may have detailed and formal procedures for dealing with complaints.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

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

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Process customer service complaints

1	how to monitor the level of complaints and identify those that should provoke a special review of the service offer and service delivery
2	why dealing with complaints is an inevitable part of delivering customer service
3	organisational procedures for dealing with complaints
4	how to negotiate a solution with your customer that is acceptable to that customer and to the organisation
5	the regulatory definition of a complaint in your sector and the regulatory requirements of how complaints should be handled and reported
6	when to escalate a complaint by involving more senior members of the organisation or an independent third party
7	the cost and regulatory implications of admitting liability for an error made by your organisation
8	how to spot and interpret signals that your customer may be considering making a complaint
9	techniques for handling conflict
10	the importance of dealing with a complaint promptly
11	why the offer of compensation or replacement service or products may not always be the best options for resolving a complaint
12	how the successful handling of a complaint presents an opportunity to impress a customer who has been dissatisfied
13	the most effective forms of response when complaints are submitted through different channels such as social media

## Performance criteria

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

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

### Deal with a complaint effectively

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

## Unit 27:

## Develop Customer Relationships

**Unit code:** CFACSD1

**SCQF level:** 5

**Credit points:** 6

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### Unit summary

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

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

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

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Develop customer relationships

1	the importance of customer retention
2	how your own behaviour affects the behaviour of the customer
3	how to behave assertively and professionally at all times
4	how to defuse potentially stressful situations
5	the limitations of your organisation's service offer
6	how customer expectations may change as they deal with your organisation
7	the cost and resource implications of an extension of the service offer to meet or exceed customer expectations
8	the cost implications of bringing in new customers as opposed to retaining existing customers
9	who to refer to when considering any variation to your organisation's service offer
10	the opportunities offered by different channels of communication such as social media for developing customer relationships

## Performance criteria

### **Build your customer's confidence that the service you give will be excellent**

- |   |  |
|---|--|
| 1 | show that you know and understand your organisation's services or products   |
| 2 | allocate the time you take to deal with your customer following organisational guidelines                            |
| 3 | reassure your customer that you are doing everything possible to keep the service promises made by your organisation |

### **Meet the expectations of your customers**

- |   |  |
|---|--|
| 4 | recognise when there may be a conflict between your customer's expectations and your organisation's service offer                                    |
| 5 | balance your customer's expectations with your organisation's service offer by offering an alternative or explaining the limits of the service offer |
| 6 | work effectively with others to resolve any difficulties in meeting your customer's expectations   |

### **Develop the long-term relationship between your customer and your organisation**

- |    |  |
|----|--|
| 7  | give additional help and information to your customer in response to their questions and comments about your organisation's services or products |
| 8  | discuss expectations with your customer and explain how these compare with your organisation's services or products                              |
| 9  | advise others of feedback received from your customer  |
| 10 | identify new ways of helping your customers based on the feedback they have given you  |
| 11 | identify added value that your organisation could offer to long-term customers   |

## Unit 28:

## Support Customer Service Improvements

**Unit code:** CFACSD2

**SCQF level:** 5

**Credit points:** 5

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### Unit summary

Organisations change the way they deliver service to their customers because customer expectations rise and because other organisations improve the services they offer. Often the most important ideas about how to improve customer service come from people dealing directly with customers. Your job involves delivering customer service. If your organisation has decided to make changes, it is your job to support them and to present them positively to your customers. Also, by listening to customer comments you may have your own ideas about how the service you deliver could be improved.

This unit is about how you provide support for changes that your organisation has introduced. In addition, it covers how you present your own ideas for improvements to someone in your organisation who can authorise trying out the change.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the Skills CFA *Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

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



## Assessment outcomes and standards

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

### Knowledge and understanding

#### Support customer service improvements

1	how customer experience is influenced by the way service is delivered
2	how customer feedback is obtained
3	how to work with others to identify and support change in the way service is delivered
4	why it is important to give a positive impression to your customer about the changes made by your organisation even if you disagree with them

## Performance criteria

### Use feedback to identify potential customer service improvements

- |   |  |
|---|--|
| 1 | gather informal feedback from your customers   |
| 2 | use your organisation's procedures to collect feedback from your customers                                     |
| 3 | use the information from your customers to develop a better understanding of their customer service experience |
| 4 | identify ways the service you give could be improved based on information you have gathered                    |
| 5 | share your ideas for improving customer service with colleagues  |

### Implement changes in customer service

- |    |  |
|----|--|
| 6  | identify a possible change that could be made to improve customer service  |
| 7  | present your idea for improving customer service to a colleague with the appropriate authority to approve the change |
| 8  | carry out changes to customer service procedures based on your own idea or proposed by your organisation             |
| 9  | keep your customers informed of changes to customer service  |
| 10 | give customers a positive impression of changes that have been made  |
| 11 | work positively with others to support customer service changes  |

### Assist with the evaluation of changes in customer service

- |    |   |
|----|---|
| 12 | discuss with others how changes to customer service are working                           |
| 13 | work with others to identify any negative effects of changes and how these can be avoided |

## Unit 29:

## Develop Personal Performance through Delivering Customer Service

**Unit code:**

**CFACSD3**

**SCQF level:**

**5**

**Credit points:**

**6**

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### Unit summary

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

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Personal performance; developing skills; improving performance; continuous improvement; improving skills; delivery; customer service; contact centres; improve; develop; communication; problem solving; behaviours; work with others; teamwork; giving information

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Develop personal performance through delivering customer service

1	your organisation's systems and procedures for developing personal performance in customer service
2	how your behaviour has an effect on the behaviour of others
3	how effective learning depends on a process of planning, doing and reviewing
4	how to review effectively your personal strengths and development needs
5	how to put together a personal development plan that will build on your strengths and overcome your weaknesses in areas that are important to customer service
6	how to access sources of information and support for your learning
7	how to obtain useful and constructive personal feedback from others
8	how to respond positively to personal feedback

## Performance criteria

### Review performance in your customer service role

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

### Prepare a personal development plan and keep it up to date

4	agree your strengths, weaknesses and development needs with an appropriate person
5	work with an appropriate person to draw up your own development objectives to improve your performance in your customer service role
6	develop a customer service personal development plan
7	regularly review your progress towards your objectives with an appropriate person

### Undertake development activities and obtain feedback on your customer service performance

8	complete development activities identified in your customer service personal development plan
9	use your day to day experiences with your customers and your own experiences as a customer to develop your customer service performance
10	obtain feedback from an appropriate person about your customer service performance
11	review and update your customer service personal development plan

## Unit 30:

## Support Customers Using On-Line Customer Services

**Unit code:** CFACSD4

**SCQF level:** 5

**Credit points:** 5

---

### Unit summary

Many organisations develop their customer service by directing customers towards online services. Customer service delivered online leaves a customer isolated and reliant on screen routes and instructions. A customer may seek help face to face or by telephone. That help will involve you in understanding what your customer is trying to achieve, how the system allows for that and what point they have reached in terms of finding the right route. Difficulties can arise if the system fails or if your customer is unable to discover how it can deliver what they want.

This unit is for you if one part of your job involves helping customers to find their way through online systems.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Face to face; telephone; system failure; development; improvement; online; customer service; contact centres; improve; develop; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Support customers using on-line customer services

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

## Performance criteria

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

- |   |   |
|---|---|
| 1 | ensure that you are completely familiar and up-to-date and with the online services that your customers use |
| 2 | listen carefully to what your customer is trying to achieve   |
| 3 | listen carefully to what your customer is having difficulties with  |
| 4 | question your customer to discover their degree of familiarity with the system                              |
| 5 | offer your customer the option of trying the online approach once more                                      |
| 6 | agree with your customer the exact nature of their problem and steps that may be taken to overcome it       |

### Support on-line customer service in conversation with your customer

- |    |   |
|----|---|
| 7  | explore the online customer system in order to develop your own knowledge and skills in its use               |
| 8  | step through the screen sequence with your customer whilst allowing them to operate the system for themselves |
| 9  | address your customer in an understanding and supportive manner   |
| 10 | explain to your customer why certain steps are required in the process  |
| 11 | offer the options to your customer of taking them through the process or completing the transaction yourself  |
| 12 | promote access to additional services or products when supporting customers online                            |



## Unit 31:

## Buddy a Colleague to Develop their Customer Service Skills

**Unit code:** CFACSD5

**SCQF level:** 5

**Credit points:** 5

---

### Unit summary

In customer service roles it is often useful to have a 'buddy' relationship with somebody who has more experience of the same customer service situation. If you are asked to buddy a colleague who is learning customer service aspects of their job, you need to approach that responsibility in an organised way.

This unit is about how to be a good buddy by working alongside your colleague and providing them with constructive feedback and support. You do not need to be more senior than your colleague or their supervisor to act as a customer service buddy.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Buddying; colleagues; develop skills; relationships; learning; working together; constructive feedback; customer service; contact centres; improve; develop; communication; problem solving; behaviours; work with others; teamwork; giving information

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Buddy a colleague to develop their customer service skills

1	the tasks in your buddy colleague's job
2	areas of the job that benefit most from buddying support
3	the customer service image and impression that should be presented in your buddy colleague's job
4	the best times at which to work alongside your buddy colleague
5	ways to work alongside your buddy colleague without intruding on the customer relationship
6	techniques for giving positive feedback and constructive criticism to your buddy colleague
7	the importance of establishing an effective rapport with your buddy colleague
8	options for actions your buddy colleague can take to improve their customer service performance

## Performance criteria

### Plan and prepare to buddy a colleague

- |   |   |
|---|---|
| 1 | agree with your colleague aspects of their work which may benefit most from your buddying support |
| 2 | your understanding of your colleague's job tasks and responsibilities using reliable sources      |
| 3 | clarify the customer service image and impression your colleague should present in their job      |
| 4 | arrange times when it will be most helpful to work alongside your colleague                       |
| 5 | plan details of a buddy session to support your colleague on the job                              |

### Support your buddy colleague on the job

- |    |   |
|----|---|
| 6  | agree with your colleague where you will be placed near them when buddying them on the job  |
| 7  | ensure your presence when your buddy is dealing with customers does not detract from effective customer service   |
| 8  | carry out customer service tasks in the presence of your buddy colleague to set an example they can follow  |
| 9  | observe your colleague closely to identify what they do well and areas in which they could improve  |
| 10 | discuss each customer transaction briefly when there is time available between dealing with customers to identify approaches that work well and areas for improvement |
| 11 | praise your colleague on aspects of their work which they have carried out well   |
| 12 | explain to your colleague ways in which they can improve their customer service performance   |
| 13 | make notes on your colleague's strengths and areas for development that you can discuss with them   |

## Performance criteria

### Provide buddy support off the job

14	arrange suitable times to meet with your buddy colleague when they are not directly engaged with customers
15	identify areas of general interest that help to establish rapport with your buddy colleague
16	use notes made when observing your colleague to discuss positive and negative aspects of their performance
17	agree actions your buddy colleague can take to improve their customer service performance
18	offer hints and tips on effective customer service actions to your buddy colleague drawn from your own experience

## Unit 32:

# Develop Your Own Customer Service Skills through Individual Learning

**Unit code:**

**CFACSD6**

**SCQF level:**

**5**

**Credit points:**

**6**

---

### Unit summary

Much of the responsibility for developing customer service knowledge and skills rests on you as an individual. There are numerous sources of information that can be used but which need to be located and linked with your customer service role. When located, the learning materials must be used to good effect in an organised manner.

This unit is about locating and using materials to help you learn in the course of your work. It is the right unit for you if you need to take responsibility for your own self-development in relation to customer service skills.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the Skills CFA *Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

CPD; learning materials; locating; self-development; self-study; developing skills; customer service; contact centres; improve; develop; communication; problem solving; behaviours; work with others; giving information; teamwork; receiving

## Assessment outcomes and standards

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

### Knowledge and understanding

#### Develop your own customer service skills through individual learning

1	ways to locate information updating you on services or products in your organisation
2	sources of information about customer service knowledge and skills that will help you to develop
3	ways to store information that you use to develop your customer service skills
4	the importance of focus when self-studying to improve your customer service knowledge and skills
5	ways to convert information or ideas you have found through self-study into practical customer service actions
6	the value of discussing your learning with line manager, your mentor or others doing a similar job
7	methods of recording actions to improve your customer service skills which have had positive effects

## Performance criteria

### Find ways to learn more about customer service and your job

- |   |  |
|---|--|
| 1 | identify different sources of information and support that will help you to develop your customer service knowledge and skills                                     |
| 2 | agree with your line manager, your mentor or others doing a similar job the best sources to use for self-development of your customer service knowledge and skills |
| 3 | take action to remind yourself to regularly access sources of information and support  |
| 4 | search for additional sources of information to support your customer service learning   |
| 5 | store materials that support self-study for future use   |
| 6 | plan time to study the self-study materials you have collected   |
| 7 | draw up a list of actions that together form a self-development plan   |

### Use sources of self-development to extend your customer service skills and knowledge

- |    |   |
|----|---|
| 8  | access organisational update information to extend your knowledge of services or products   |
| 9  | access organisational information to learn more about the way your role contributes to customer service                               |
| 10 | monitor publications to identify ideas and new developments in customer service which you could apply in your work                    |
| 11 | study collected information to develop your own customer service knowledge and skills   |
| 12 | take action resulting from your learning to change the way you deal with customers  |
| 13 | share your plans for action with your line manager, your mentor or others doing a similar job to seek their ideas for further options |
| 14 | record actions you take to learn more about customer service and identify those which have the most positive effects                  |

## Unit 33:

# Support Customers Using Self-service Technology

**Unit code:**

**CFACSD7**

**SCQF level:**

**5**

**Credit points:**

**5**

---

### Unit summary

Many organisations develop their customer service by directing customers towards self-service equipment which is operated by the customer alone. Regular customers become familiar with how that equipment operates and some will feel uncomfortable about being offered further help. Others may be learning about the use of the equipment for the first time or may be experiencing particular problems. Sometimes equipment fails and authorised intervention will be needed to clear it. Whichever is the case, you must be able to recognise what help and intervention is needed and to provide that in a way that pleases your customer and builds their confidence in the use of the equipment.

This unit is right for you if any part of your job involves helping and encouraging customers to operate self-service equipment in order to improve their customer experience.

### Unit assessment requirements

Assessment of candidates in a realistic working environment, including work experience and work placement, is permitted for this unit. Please refer to the *Skills CFA Assessment Strategy* in *Annexe A* for specific guidelines on assessment in a realistic working environment.

### Terminology

Self-service equipment; self-study; technology; interventions; operators; customer experience; customer service; contact centres; improve; develop; communication; problem solving; behaviours; work with others; teamwork; giving information



## Assessment outcomes and standards

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

### Knowledge and understanding

#### Support customers using self-service technology

1	reasons why your organisation chooses to offer customers self-service equipment
2	all aspects of normal operation of the customer self-service equipment
3	frequently asked questions about operation of the self-service equipment and effective answers to those questions
4	techniques for giving an effective demonstration of self-service equipment
5	signals and signs that a customer needs help with self-service equipment
6	organisational procedures for using staff intervention to clear self-service equipment
7	the importance of building customer confidence in using self-service equipment
8	organisational procedures for dealing with self-service equipment problems

## Performance criteria

### Identify the type of help needed by a customer using self-service technology

- |   |   |
|---|---|
| 1 | prepare a standard demonstration of using the self-service equipment  |
| 2 | prepare to answer frequently asked questions about the operation of the self-service equipment                                  |
| 3 | identify signs of when a customer is having difficulty with the self-service equipment  |
| 4 | choose an appropriate style and level of intervention to help a customer who is having trouble using the self-service equipment |

### Assist a customer using self-service technology

- |    |   |
|----|---|
| 5  | maintain a professional, polite and approachable manner while you observe customers using self-service technology |
| 6  | demonstrate use of the self-service equipment to a customer   |
| 7  | respond to a request for help from a customer using self-service equipment  |
| 8  | make use of staff override options to clear self-service equipment for use by customers                           |
| 9  | talk a customer through use of the self-service equipment whilst allowing them to operate it                      |
| 10 | invite a customer to repeat the operation of the self-service equipment if that helps them to learn               |
| 11 | make positive and encouraging comments to a customer who is learning to use the self-service equipment            |
| 12 | explain to your customer why certain actions and steps are needed to operate self-service equipment               |
| 13 | troubleshoot problems with self-service equipment and report errors and issues to appropriate people              |

## 13 Further information and useful publications

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

- Edexcel, BTEC and Pearson Work Based Learning contact details: [qualifications.pearson.com/en/support/contact-us.html](http://qualifications.pearson.com/en/support/contact-us.html)
- books, software and online resources for UK schools and colleges: [www.pearsonschoolsandfecolleges.co.uk](http://www.pearsonschoolsandfecolleges.co.uk)

Key publications:

- *Adjustments for candidates with disabilities and learning difficulties – Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications* (Joint Council for Qualifications (JCQ))
- *Equality Policy* (Pearson)
- *Recognition of Prior Learning Policy and Process* (Pearson)
- *UK Information Manual* (Pearson)
- *UK Quality Vocational Assurance Handbook* (Pearson)

All of these publications are available on our website.

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

Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, go to the resources page on our website, [qualifications.pearson.com](http://qualifications.pearson.com)

## 14 Professional development and training

### Professional development and training

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

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

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

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

### Training and support for the lifetime of the qualifications

To get in touch with our dedicated support teams please visit our website, [qualifications.pearson.com](http://qualifications.pearson.com)

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

### Online forum

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

## 15 Contact us

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

**Email:** wblcustomerservices@pearson.com

**Telephone:** 0844 576 0045

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

**Email:** wbl@pearson.com

**Telephone:** 0844 576 0045

### Complaints and feedback

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

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

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

## Annexe A: Assessment Strategy

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### Skills CFA

#### Assessment Strategy

#### Competence Units (S/NVQ)

#### Business Administration

#### Customer Service SVQs

#### Management and Leadership

April 2015

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## 1. Introduction

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

This document outlines Skills CFA principles in regards to:

- external quality control of assessment
- requirements of assessor and verifiers
- evidence
- employer direct model.

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

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

## 2. External quality control of assessment

---

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

### 2.1 External verification

- Awarding organisations are responsible for the competence of external verifiers. It is the responsibility of awarding organisations to monitor centres' performance in accordance with regulatory requirements.
- Awarding organisations must consistently apply external verification processes at all assessment centres delivering competence-based qualifications. These should be underpinned by standard risk assessment and risk management processes.

### 2.2 Risk assessment

- Awarding organisations must carry out standard risk assessments for all qualification assessment centres that are delivering competence-based qualifications. Identified risks must be managed appropriately.
- Awarding organisations must retain evidence to prove that a risk assessment has been carried out for each approved centre, and that a strategy to minimise any identified risk has been implemented.

### 2.3 Data requests

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



### 3. Requirements of assessors, EQAs and IQAs

---

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

#### 3.1 Assessors

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

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

To be able to assess candidates, assessors must:

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

#### AND ONE OF EITHER OF THE FOLLOWING

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

#### OR

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

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

### 3.2 External quality assurer (EQA)<sup>1</sup>

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

EQAs must:

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

#### **AND ONE OF EITHER OF THE FOLLOWING**

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

#### **OR**

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

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

---

<sup>1</sup> Also known as External Verifier (EV)

<sup>2</sup> The need for countersigning the decisions of EQAs working towards a qualification-applies to England and Wales and Scotland

### 3.3 Internal quality assurer (IQA)<sup>3</sup>

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

IQAs must:

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

#### AND ONE OF EITHER OF THE FOLLOWING

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

#### OR

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

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

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<sup>3</sup> Also known as Internal Verifier (IV)

<sup>4</sup> The need for countersigning the decisions of IQAs working towards a qualification applies to England and Wales and Scotland

## 4. Evidence

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### 4.1 Evidence from workplace performance

- Evidence of occupational competence of all competence units at any level should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria of the (QCF) competence units.
- These conditions would be those typical to the candidate's normal place of work. The evidence collected under these conditions should also be as naturally occurring as possible. It is accepted that not all employees have identical workplace conditions and therefore there cannot be assessment conditions that are identical for all candidates. However, assessors must ensure that, as far as possible, the conditions for assessment should be those under which the candidate usually works.

### 4.2 Simulation

- Simulation can be applied to all QCF units listed in *Appendix B*.
- Where simulation is used for QCF units at Level 2 and above, it should only form a small part of the evidence for the qualification.
- Evidence may be produced through simulation solely in exceptional circumstances. The exceptional circumstances, under which simulation is possible, are those situations that are not naturally or readily occurring, such as response to emergencies.
- Simulation must be undertaken in a realistic working environment (RWE). A RWE is "an environment which replicates the key characteristics in which the skill to be assessed is normally employed". The RWE must provide conditions the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Guidelines for using RWE can be found in *Appendix A*.
- Simulation can also be used for SVQs. However, where simulation is used for SVQ units, it should only be for small parts of the units (at any level), in exceptional circumstances only and undertaken in RWE.

## 5. Employer direct model

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

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

**OR**

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

In order to use the employer direct model:

- **An organisation must:**

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

**OR**

- seek guidance and approval from an awarding organisation to demonstrate that they have:
    - appropriate processes in place to facilitate assessment, moderation or verification functions
    - carry out 100% mapping of the trainer, supervisor or managers' assessment, moderation or verification skills and knowledge to the National Occupational Standards upon which the qualifications above are based.

- **An awarding organisation must:**

- offer this model to employers only
  - supply information on the requirements for internal and external moderation/verification activities to assessment centres.

## **6. Appendix A - Realistic working environment guidelines**

---

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

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

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

1. the RWE is managed as a real work situation
2. assessment must be carried out under realistic business pressures
3. all services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations
4. candidates must be expected to achieve a volume of work comparable to normal business practices
5. the range of services, products, tools, materials and equipment that the candidates use must be up to date and available
6. account must be taken of any legislation or regulations in relation to the type of work that is being carried out
7. candidates must be given workplace responsibilities to enable them to meet the requirements of the units
8. customer perceptions of the RWE is similar to that found in the work situation being represented
9. candidates must show that their productivity reflects those found in the work situation being represented.

## 7. Appendix B – Simulation: a list of QCF units

Simulation can be applied to the following competence units only.

### Business Administration

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

### Customer Service

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

### Management and Leadership

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

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**January 2016**

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